Appendix 4

Retail Strategy

Waterford City & County Council
Comhairle Cathrach & Contae Phort Láirge

WATERFORD CITY & COUNTY RETAIL STRATEGY 2020

Comhairle Cathrach & Contae Phort Láirge
Waterford City & County Council

JSA John Spain Associates
Planning & Development Consultants
Chartered Town Planners & Chartered Surveyors

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CHAPTER 1

Introduction

1.1 INTRODUCTION

1.1.1 The Retail Planning Guidelines (RPGs) for Planning Authorities, issued by the Department of the Housing, Planning and Local Government (DoHPLG) in 2012, require Local Authorities to prepare retail strategies and policies for their areas and to incorporate these where appropriate into their Development Plans. In 2003, John Spain Associates prepared a report regarding retailing in Waterford City. This included a quantitative and qualitative analysis of the potential of Waterford City to accommodate further retail development. This report formed the basis for the retail policies and objectives set out in the then City Development Plan. Then in 2011 John Spain Associates prepared a new Retail Strategy for the City and this was adopted as part of the Waterford City Development Plan 2013-2019.

1.1.2 Then in February 2017 John Spain Associates prepared an update and addendum report to take into consideration the key changes to the planning policy framework guiding the development of the city. In particular the designation of the North Quays as a Strategic Development Zone (SDZ) and the emerging proposals for the SDZ area.

1.1.3 However, considering the increased demand for retail services that the City & County have experienced over the past number of years, and the challenge posed by the severe economic downturn experienced over the last decade, the time is opportune to review the retail strategy for both the city and county. Furthermore, with the enactment of the Local Government (Reform) Act in 2014 the Councils of Waterford County and Waterford City were merged to form a new unitary Waterford City & County Council. This is particularly relevant in the context of the forthcoming review of the current Waterford City Development Plan 2013-19 and the Waterford County Development Plan which is due to commence shortly following publication of the Regional Spatial & Economic Strategy, and which will see the formulation of a new combined City & County Development Plan 2022-2028. It is envisaged that the retail strategy will form an integral part of the City & County Council's overall vision for the development of Waterford City & County over the period of this new plan.

1.1.4 It is also pertinent in light of the ongoing growth in on-line retailing and the competition this is bringing to the traditional 'bricks & mortar' shops. This report reviews the vitality, attractiveness and viability of Waterford City Centre and the town centres of Dungarvan & Tramore as places to shop, do business, work, live, spend leisure time and further develop and set a direction for these urban centres over the next number of years. The report in particular identifies the pressures that Waterford City is facing from competing centres and from the growth of new retail formats through the development of online technologies and social media. The formulation of a detailed retail strategy is therefore imperative in order to ensure that the vibrancy and vitality of Waterford City, and the key towns of Dungarvan & Tramore are maintained, enhanced and developed to their full potential.

1.1.5 This report, and the empirical evidence which underpins it, was researched, collected and prepared prior to the Covid-19 Pandemic striking Ireland earlier this year. Since the outbreak of the Corona virus in March and the imposition of severe travel and operating restrictions, the retail sector has been dramatically impacted.

While convenience stores have been permitted to continue to trade throughout the lockdown period, albeit with social distancing requirements, comparison and bulky goods outlets have had to remain closed for the last three months. While many of these retail outlets have migrated or expanded into on-line sales, this is unlikely to be at the normal volumes of sales.

1.1.6 It is too early to assess either the short term or longer term impact which the pandemic will have on the retail sector, and there are no official statistics published to date which captures the changes which have been occurring and will continue to occur to retail trends. What we do know is that a number of large British based multiples such as Debenhams have already gone into receivership, and that a lot of 'bricks & mortar' retailers will have lost market share to on-line sales.

1.1.7 To plug this gap, and in order to be able to assess economic activity in real-time, the Department has compiled a set of alternative, 'ultra-high' frequency data for different sectors of the economy. These ultra-high frequency data provide reasonably approximations for 'directions of travel' for the economy and, as such, complement rather than replace official data. The most recent such document by the Department of Finance was published on the 8th June and titled *'Emerging economic developments - real-time economic domestic indicators'.* Some of the key findings for the retail sector from this publication are summarized below:

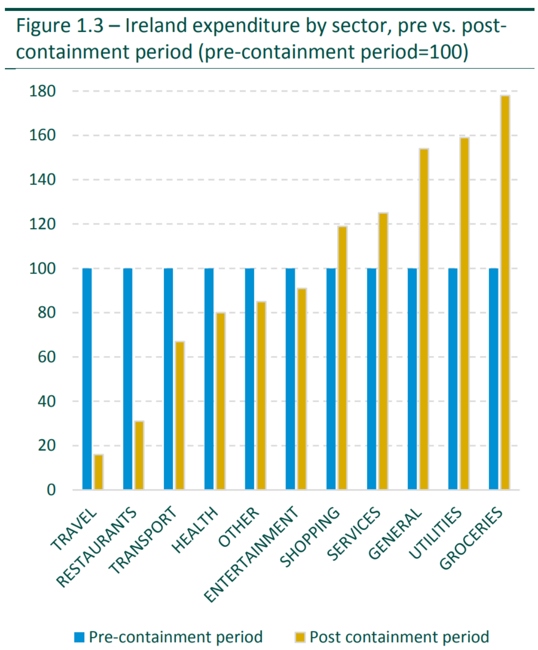


Figure 1.1 extract from 'Ireland expenditure by Secrot prevs post containment period Source: Revulot

1.1.8 What this Figure shows is that categories ordered by size of percentage change in the total volume of expenditure ranging from 84% decline in travel to 78% increase in groceries.

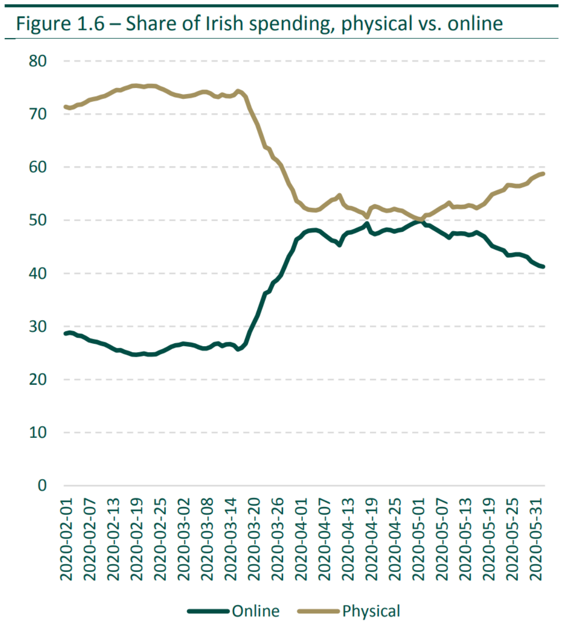


Figure 1.2: extract of Figure 1.6 from 'Shrae of Irish Spending' (Source: Revulot)

1.1.9 Figure 1.2 illustrates that the pandemic has led to an increase in a proportion of expenditure carried out online, accounting for 30 per cent of total expenditure in early February, to close to 50 per cent in late April, however this trend has slightly reversed in recent weeks to just over 40 per cent as some restrictions have been lifted. However, as shown on Figure 1.3 below, as of 21st May, the proportion of expenditure made online in other countries ranges from 41% to 71%, with Ireland being behind Spain, Demark, Britain and Italy.

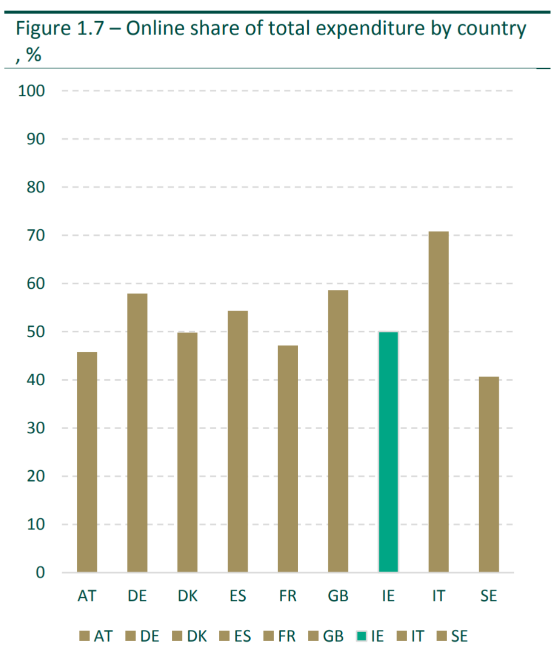


Figure 1.3 extract of Figure 1.7 from 'Online shrae of total expenditrure by County (Source: Revulot)

1.1.10 Without any further published data it is not possible to further update this report or to predict with any certainty what is likely to happen in the retail industry in the years ahead. However, assuming that the Irish economy does substantially recover over the next 18-24 months, then we would expect the retail sector to make a reasonable recovery as well. The convenience market is likely to hold its position from pre-Covid times. For comparison retailing the situation is likely to be more fluid, particularly with increased competition from on-line sales.

1.1.11 During the lockdown period consumers generally have become more familiar and comfortable with shopping on-line, and this is likely to lead to an acceleration in growth of market share accounted for by internet sales in the years ahead.

1.1.12 Overall there will be a short term hit from the Covid-19 pandemic to the comparison retail sector, which may add approximately two years until we start to see growth again in both volumes and monetary terms, and this growth in in-store sales may well be retarded by an increasing share by on-line sales. What will be important is to closely monitor and review trends as we emerge from the pandemic to see if new patterns are emerging in the retail sector and customer behaviours.

1.2 WATERFORD CITY & COUNTY IN CONTEXT

1.2.1 Waterford City is the principal urban centre in the County and is the main economic driver for the south east under the National Planning Framework. The role of the City has undergone significant change in recent years, as it has diversified its economic base beyond the traditional manufacturing sectors into tertiary services.

1.2.2 As was detailed in the Waterford City Centre Report from 2009, Waterford's retail offer while improving has not radically expanded geographically beyond the traditional city centre area. Given the constraints of a tight urban core with multiple ownerships and access and archaeological constraints, site acquisition has proven difficult. A major city centre scheme has been granted permission by the Council in the Michael St./New Street area, but to date this site has remained undeveloped. In addition, while the North Quays have been designated as a Strategic Development Zone, and a Planning Scheme has been approved by An Bord Pleanala which would permit a large scale mixed use development, including retailing, no actual development has commenced to date. The advanced contracts and enabling works have been progressing over the last 12 months.

1.2.3 The City is experiencing increased pressures from outside influences and in particular national competing centres in Cork & Dublin which have increased their attractions and retail offerings. Furthermore, the City is now more accessible due to the completion of the M9 to Dublin, the N25 City Bypass River Crossing and the City Ring Road. This however, may have the converse affect, in that it makes it easier for residents of the City to travel to other centres including Kilkenny, Dublin and Cork, thus potentially exacerbating the problem of expenditure leakage.

1.2.4 Waterford City retains a distinctive character, yet despite an attractive and historic city centre, the City has not benefited to the degree it should from the process of rejuvenation and redevelopment as seen in some other major urban centres in the region. The City has not fully realised its potential to develop into a major commercial and retail centre for the region. Whilst the City contains a reasonable range of shops and services, and in particular independent retailers, the choice, diversity and overall mix of retail could be greatly improved, in particular the City lacks major retail anchors and national and international fashion multiples that would normally be found in a City of this scale. It is evident that the City has the potential to develop much further, if given the right range of actions, policy framework and economic conditions.

1.2.5 Dungarvan and Tramore are the two other principal urban centres within the County, each with a population around the 10,000 mark. Each plays an important, but distinctive role within their respective catchment areas. Dungarvan, as the 'County Town' and seat of the former Waterford County Council, provides a range of retail and other services to a wide catchment area in west Waterford, and as a result has a reasonably wide retail offering for both convenience and comparison goods, including bulky goods. Tramore, given its proximity to Waterford city, operates more as a commuter town, and as such has a much more limited retail offering, mainly focused on convenience goods. With the opening of Tesco and Lidl supermarkets in the town in recent years, Tramore has become more self-sufficient for convenience shopping.

1.2.6 The County also contains a number of other towns and villages, with their own distinctive character, and which provide a local shopping function. This retail offer which (whilst small) is specialised and niche/arts/craft based in towns such as Ardmore; Lismore, Dunmore East (tourism and marine based), and Cappoquin. The retail planning policies should endeavour to maintain and grow this local distinctiveness of the towns and villages and build on their specific assets for niche retail markets, as well as maintaining their important local convenience shopping function.

1.3 THE PURPOSE OF THE RETAIL STRATEGY

1.3.1 The purpose of the retail strategy is to implement the objectives of the Retail Planning Guidelines. A key aim will be to ensure that Waterford City fulfils its role as the principal retail destination in the County and the South East region and performs as the major economic driver for the South East region, and that the towns of Dungarvan & Tramore continue to play important complimentary and supportive roles within their respective catchment areas, in addition to the provision of an appropriate range of retail facilities at a local level throughout the County.

1.3.2 In preparing the strategy, particular regard was had to:

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

ii. The impact of new national and regional planning policies;

iii. Updated economic data;

iv. Population growth based on the 2016 Census and predicted trends in the recently published Regional Spatial & Economic Strategy for the Southern Region;

v. The vitality and viability of Waterford City Centre including a

   (a) Review of changes in land use within the city & town centres;
   (b) Review suitability of existing floorspace;
   (c) An assessment of proposed developments on the retail profile and structure of the city and county.

vi. The impact of major retail development in competing centres.

vii. The impact of the growth in on-line retailing

1.4 APPROACH

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

BOX 1.1: APPROACH

Policy Analysis: National, regional and local policies were reviewed in the context of the retail strategy with particular reference to the retail hierarchy and existing and emerging policies.

Economic Context: Retail expenditure is influenced by the economic performance of the City, County, of the region and the national economy. The economic context for the analysis was therefore established.

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

Survey: Existing retail floorspace data for the city and county was updated. A household survey was undertaken to establish the existing shopping patterns in the City & County. A survey of 500 respondents was carried out. This provided data on the extent of leakage to other competing centres and highlighted shoppers concerns regarding the quality and quantum of existing retail floorspace. The results of the survey helped to define existing patterns of inflows and outflows of expenditure from the City & County and its catchment area. A shopper's survey provided a snap shot view of retailing in the City from the shoppers perspective. A total of 500 shopper questionnaires were completed in the city, Dungarvan & Tramore to inform the analysis.

Qualitative Survey: A qualitative health check survey was carried out in order to assess the current level of vitality and viability of Waterford City and the town centres of Dungarvan & Tramore to assess their strengths and weaknesses in retail terms.

Quantitative Analysis: Population analysis, expenditure analysis, turnover analysis and overall analysis were carried out.

1.5 PREPARATION OF RETAIL STRATEGY

1.5.1 Following the analysis set out above, the strategy then sets out clear policies, actions and a vision for the future for Waterford City & County. The strategy will consider the development potential of Waterford and the preparation of policies to promote the development of a distinctive retail identity for the City, Dungarvan & Tramore.

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

i. Population forecasts.
ii. Establishing convenience and comparison expenditure between 2010 to 2016 and 2016 to 2022.
iii. Establishing the extent of existing floor space and its turnover.
iv. Analysing the above data to determine the potential convenience and comparison spend available to support new retail floor space to 2026 and 2031.

1.5.3 The final component of the study was to determine the retail strategy for Waterford City & County to 2026. The factors influencing this included:

- Retail hierarchy.
- Population size and distribution.
- Sequential test.
- Nature of retail provision and need – convenience, comparison and retail warehousing.
- Opportunity sites for retail development.
- The shopping environment and mechanisms to enhance the vitality and viability of Waterford City Centre and the town centres of Dungarvan & Tramore.
- The need to sustain and enhance Waterford's regional role and prevent unnecessary leakage of expenditure to competing centres.
- Opportunities to attract enhanced retailing to the City and key towns in the county.

1.5.4 The report concludes with recommendations regarding the criteria and actions for assessing future retail development in the City & County.

1.6 REPORT STRUCTURE

1.6.1 The report structure is set out in Box 1.2.

BOX 1.2: REPORT STRUCTURE

Chapter 1:	Introduction
Chapter 2:	Policy Context
Chapter 3:	Economic Context and Current Trends in Retailing
Chapter 4:	Survey Approach and Analysis
Chapter 5:	Health Check Assessment
Chapter 6:	Quantitative Assessment
Chapter 7:	Policies, Action and Vision for the Future
Chapter 8:	Criteria and Actions for Assessing Future Retail Development

CHAPTER 2

Policy Context

2.1 INTRODUCTION

2.1.1 The purpose of this chapter is to review the relevant planning and sectoral policy documents which will guide the development of Waterford City & County and influence the future expansion of retail services in the City & County.

2.1.2 In this section, we identify the current and emerging plans, policies and proposals that are relevant to the review of Retail Strategy in the following order:

- National
- Regional and
- Local

2.2 NATIONAL LEVEL

2.2.1 Four national level plans, strategies and guidelines are of particular relevance to the shape and direction of the Strategy. These are

- National Planning Framework 2018
- The National Development Plan 2018-2027
- Retail Planning Guidelines for Local Authorities 2012
- Smarter Travel – A Sustainable Transport Future – A New Transport Policy for Ireland 2009 – 2020

National Planning Framework 2018

2.2.2 The National Planning Framework (NPF) was published on 18th February 2018. The NPF provides a broad planning framework for the location of development in Ireland over the next 20 years. The key objective of the National Planning Framework is the achievement of more balanced and sustainable regional development, and the promotion of compact growth in the cities and towns. The strategy examines the growth patterns of the various regions in the country and provides guidance on the future direction of this growth. It also identifies potential development patterns for different areas and sets out overall policies for creating the conditions necessary to influence the location of different types of development in the future.

2.2.3 Under the National Policy Objective 2a the NPF sets a target that half (50%) of future population and employment growth is to be focused in the State's five cities and their suburbs. It further states that within the cities at least 50% of all future housing must be located within the existing built up area of the city & suburbs.

2.2.4 With regard to Waterford City, the NPF projects that Waterford's current population of c. 50,0000 people should grow by between 50-60% by 2040. It is stated that *"many of the challenges facing Waterford are similar to those that confront other cities, especially in the area of planning and development and maximising the* *value of key assets, including in Waterford's case a major national port complemented by a compact city with a high quality urban fabric".*

2.2.5 The NPF recognises that Waterford is the principal urban centre in Ireland's south-east and is unique in having a network of large and strong regional urban centres in close proximity within each of the surrounding counties that both complement the role of Waterford and perform strong regional and local economic and developmental roles for their own areas. Given the unique urban composition of the south east and the objective to enable Waterford City to become a regional city of scale, an agreed development strategy is required to build Waterford's population and employment base substantially while enabling surrounding urban centres to perform complementary roles.

2.2.6 From a national perspective, the NPF recognizes that a stronger Waterford City would lead the development of the wider south-east, which has experienced slower economic recovery than the national average in recent years, together with high unemployment rates, lower value job opportunities and less job creation.

2.2.7 The NPF identifies the key challenge for Waterford is to build scale and enhance urban quality through employment led growth. The City's existing employment base includes pharma, med-tech and engineering/ advanced manufacturing sectors, as well as emerging indigenous enterprises. There is capacity to build on all of these strengths while enhancing Waterford's small-city attractiveness and quality of life. This includes capitalising on good and improved connectivity to Dublin and Cork in particular. Waterford also offers opportunities as a location for support functions in areas such as financial or professional services that may wish to avoid larger urban areas. It is also an emerging tourist centre, located on the route from Rosslare to Cork and the South-West and as a destination for cruise traffic.

National Development Plan (2018 – 2027)

2.2.8 The National Development Plan covers the period from 2018-2027. The plan sets out a national development strategy in the areas of physical, social and community infrastructure.

2.2.9 The National Development Plan aims to meet a number of key challenges which includes the following:

- Remove remaining infrastructural bottlenecks that constrain economic development;
- Ensure that the enterprise sector continues to expand and attract investment;
- Recognise that economic and social progress are inter dependent;
- Ensure that the National Planning Framework policies and objectives are reflected in the implementation of the Plan;
- Protect, preserve and improve the natural environment;
- Ensure integrated, value for money governance.

2.2.10 It is detailed that the plan will promote regional development with a particular focus on investment in the State's five cities, including Waterford. It outlines that the key to regional development will be the efficient utilisation of Plan investment, especially in infrastructure. The investment framework and strategy in the NDP will assist and enhance physical and spatial planning and promote regional development.

2.2.11 The NDP details that investment priorities for Waterford include:

- Creation of effective bus based public transport network (BusConnects) building on recent fleet investment through widespread bus prioritisation measures.
- Enhancement of road links to other cities along the Atlantic Road Corridor.
- Enhanced intercity rail services between Waterford and Dublin.
- Enhancing port facilities and facilitating relocation of port activities.
- Investment in the R&D capacity of Waterford Institute of Technology to underline the importance of education to Waterford as a centre of excellence.
- Development of industry/Institute of Technology linkages within the South East Region.
- Renewal and development of the North Quays.
- Development of strategic sites as part of IDA Ireland Strategic Sites Initiative.
- Continued support for Waterford Regional Airport.

Retail Planning Guidelines 2012

2.2.12 The Retail Planning Guidelines, issued under Section 28 of the Planning & Development Act 2000, as amended, provide national level policy guidance in relation to retailing. The guidelines provide clear objectives for retail policy, set out guidance in relation to specific retail formats and issues advice in relation to the location of new retail development. The guidelines represent a plan led approach to retail development at a national level, which is then followed on by the use of county and city retail strategies to guide development at a localised level. The guidelines define five key objectives. These may be summarised as follows:

- To ensure that in future all development plans incorporate clear policies and proposals for retail development.
- To facilitate a competitive and healthy environment for the retail industry of the future.
- To promote forms of development which are easily accessible particularly by public transport – in a location which encourages multi-purpose shopping, business and leisure trips on the same journey.
- To support the continuing role of town and district/suburban centres.
- A presumption against large retail centres located adjacent or close to existing new or planned national road/motorways.

Sequential Test

2.2.13 One of the key features of the guidelines is the introduction of the sequential test approach in relation to assessing retail applications, with the focus on town/city centres as the preferred location for new retail development. Where there are no town/city centre sites available, the next preferred option is edge of centre sites. Out of centre sites should only be considered where there are no town/city centre or edge of centre sites available or where satisfactory transport accessibility realistically cannot be ensured within a reasonable period of time.

Retail Hierarchy

2.2.14 The guidelines also set out the principle of the retail hierarchy. The primacy of Dublin is recognised, however it is detailed that Cork, Limerick, Galway and Waterford – the second tier of the hierarchy, with a combined urban population amounting to 10% of the State account between them for a further 19% of comparison turnover and 15% of convenience turnover. It is outlined that these centres provide a range of high order comparison shopping which is largely unmatched elsewhere. Within each county, retailing also follows a hierarchical pattern from town centre, district/suburban centre, local centre and village centre. The principle of a hierarchy of retail centres is an integral part of a retail strategy as it is a general principle that retail development will be promoted and existing provision enhanced within existing centres.

The Role of Town Centres

2.2.15 The guidelines recognise that town centres, such as Dungarvan or Tramore, together with district/suburban centres like Ardkeen or Kilbarry and major village centres like Tallow serving rural areas provide a broad range of facilities and services and act as a focus for the local community.

2.2.16 The main thrust of the retail guidelines is that the vitality and viability of existing town centres should be protected and enhanced. According to the guidelines, vitality is a measure of how active and buoyant a centre is, whilst viability refers to the commercial well being of a town. Planning authorities are encouraged to adopt an active role in protecting and enhancing the vitality and viability of existing town centres.

2.2.17 The guidelines indicate a number of indicators which determine the vitality and viability or health of existing town centres. These indicators include the range and quality of activities in a centre, mix of uses, accessibility to people living and working in the area and general appearance.

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

2.2.18 This document is designed to show how we can reverse current unsustainable transport and travel patterns and reduce the health and environmental impacts of current trends and improve quality of life. The document outlines that key to achieving this will be better integration of land use and planning and transport policies. A key target of the document is that future population employment growths will predominantly take place in sustainable compact forms which reduces the need to travel for employment and services. A key action of the guidelines is a general restriction on the development of out of town retail centres except in exceptional circumstances and consideration of a similar requirement that parking charges be introduced for most existing centres.

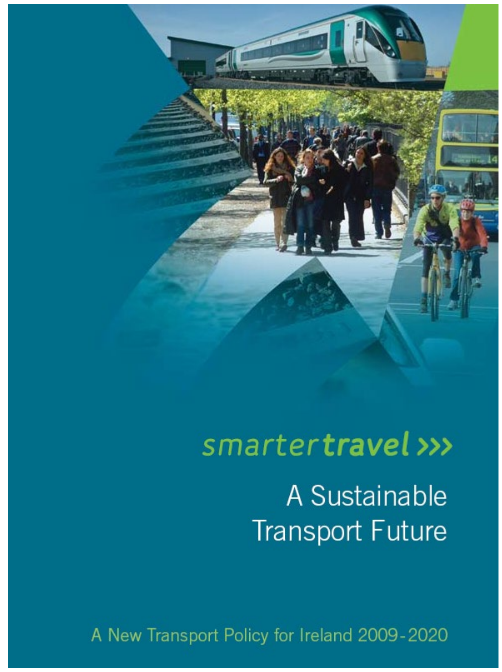


Figure 2.1: Smarter Travel

Conclusions

2.2.19 A review of National Policy identifies that Waterford City is a designated as the key economic driver for the region and thus is to be the focus of sustained infrastructural investment in order to ensure it has a critical mass of population and services commensurate with its status. Retailing is an important factor in ensuring that the City and the key towns have the necessary attractions and facilities for their residents and visitors. It is a critical element in ensuring that the main urban centres are attractive place to live, work and invest in and to maintain their vitality and vibrancy. The consolidation of retailing in the City is also important from a sustainable planning and development perspective as the City Centre is the most accessible location in the County and is well served by public transport infrastructure. The consolidation of retailing in the city centre also ensures that there is potential for commercial synergy and linked trips. It is also important from a tourism perspective.

2.3 REGIONAL LEVEL

Regional Spatial & Economic Strategy for the Southern Region 2019-2031

2.3.1 The Southern Region covers all of the cities and counties in Munster, together with the counties Carlow, Kilkenny, and Wexford in the south-east. The region covers an area of 29,500 sq.m. representing c. 42% of the area of the State. The Southern Region had a population of 1.58 million in 2016, representing one third of the State's total population. The Regional Spatial & Economic Strategy (RSES) replaces the former Regional Planning Guidelines, and sets out a 12-year strategic development framework to guide the future development of the region in line with the policies and objectives of the National Planning Framework at regional level. The RSES establishes a broad framework under which the society, economy, environment and use of land should evolve, identifying key priorities for investment. The RSES also incorporates specific development strategies for each of the three metropolitan areas within the region, centred around Cork, Limerick & Waterford Cities. Of most relevance for this report is the Metropolitan Area Strategic Plan (MASP) for Waterford. The draft Regional Strategy and Metropolitan Plans are due for final adoption by the Southern Regional Assembly at the end of January 2020.

2.3.2 A key component of the Regional Strategy is to strengthen the settlement structure of the region, to capitalise on the individual and collective strength of the region's three cities, and the network of key towns. The RSES specifically recognises the importance of the three cities as drivers of national growth, and are key regional centres which require significant investment. The cities provide the pillars on which to base a coherent settlement and economic strategy which underpins the RSES, including the identification of strategically located key towns, including Dungarvan.

2.3.3 It is outlined in the RSES that the population in the South-East in 2016 was 509,500, and by 2026 it is projected to grow to between 561,000 – 572,000, and by 2031 to between 581,500-598,500.

2.3.4 A summary of the key elements of the strategy for structuring the overall regional growth, building accessible centres of scale and securing compact and sustainable growth are set out Figure 2.2 taken from the Southern Region Regional Spatial & Economic Strategy.

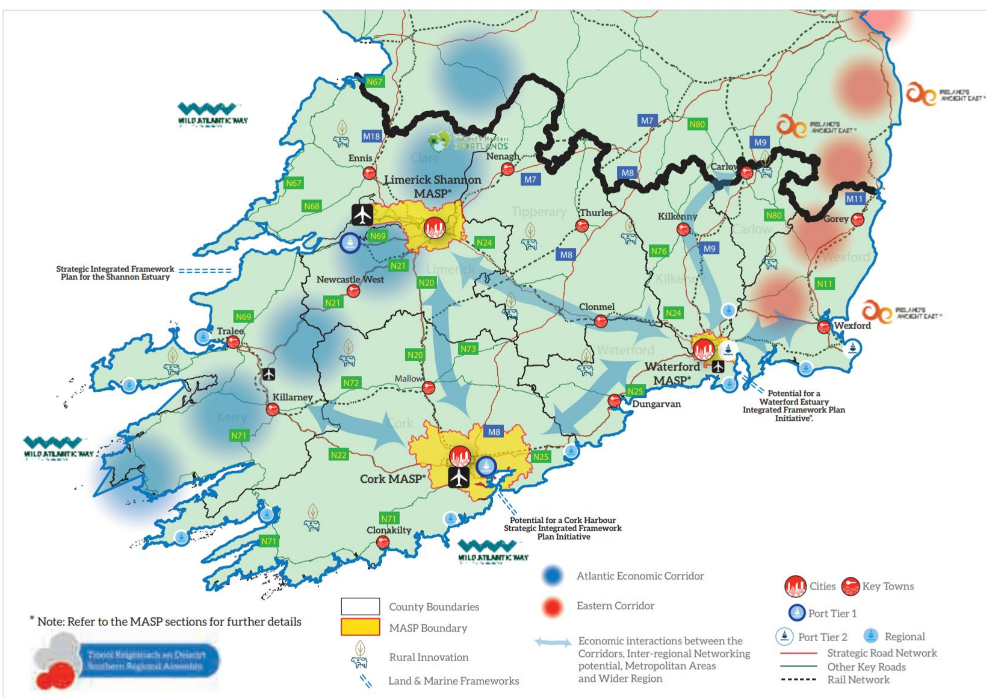


Figure 2.2 Strategy Map taken from the Regional Spatial & Economic Strategy for the Southern Region

Waterford Metropolitan Area Strategic Plan (MASP)

2.3.5 The MASP is a new addition within the planning hierarchy and sits between the regional and local level, and provides a strategic planning framework to guide the development of the city and its immediate hinterland. Figure X.Y below illustrates the extent of the area covered by the Waterford MASP. The MASP area encompasses an area of 143 sq.km. of which c.85 sq.km. is in Waterford City & County and c. 58sq.km. in County Kilkenny. The Waterford Metropolitan Area recorded a population of just under 60,000 in 2016.

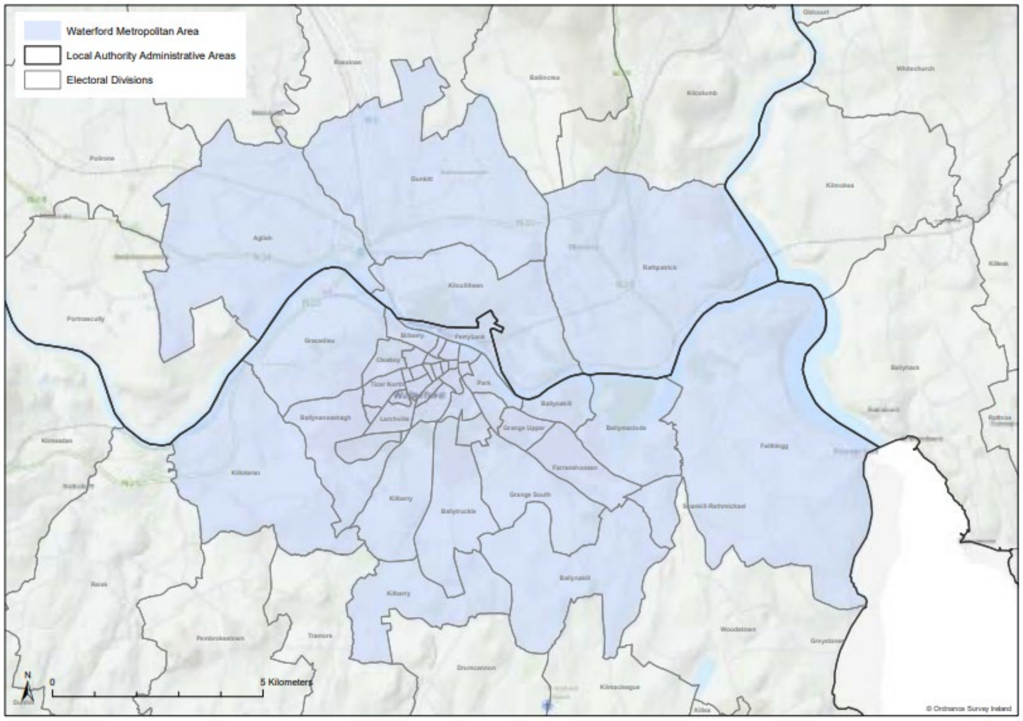


Figure 2.3 Waterford Metropolitan Area Source: Southern Regional Assembly RSES

2.3.6 Section 3.1 of the MASP sets out the vision for the Waterford Metropolitan Area which is:

"Waterford - a City and Metropolitan Area of scale and significance, driving regional growth and prosperity and realising its full potential on behalf of the local and national population.
A sustainable, dynamic and resourceful Place where people will seek to visit, live, work, invest, experience and socialise in, as a matter of choice.
The Waterford Metropolitan Area will embrace the concept of the Concentric City, North & South of the River, as described in the Waterford Planning, Land Use and Transportation Study (PLUTS) 2004-2020."

2.3.7 The Waterford MASP sets out the following population projections for the metropolitan area:

Table 2.1 Waterford Metropolitan Area Population Projections

Table 1 | *Population Projections 2026 and 2031 for the Waterford Metropolitan Area*[3]

Settlement	2016	2026	Uplift	2031 (See Note 5)	Uplift (See Note 5)
City & suburbs (Kilkenny) + 60% to 2040	5,288	6,608	1,320	7,268	660
Remainder Metropolitan Area (Kilkenny) + 30% to 2040	2,951	3,321	370	3,506	185
City and suburbs (Waterford) + 60% to 2040	48,216	60,716	12,500	66,966	6,250
Remainder Metropolitan Area (Waterford) + 30% to 2040	3,399	3,819	420	4,029	210
METRO AREA TOTAL POP. (+34,007 to 93,861 in 2040)	59,854	74,464	14,610	81,769	7,305

2.3.8 The ambitious targets for 60%+ population growth by 2040 seek to build the critical mass of Waterford as a balanced concentric metropolitan area, north and south of the River Suir. In the long term a greater proportion of the population is projected to live north of the river.

2.3.9 The steps identified in the MASP required to achieve this core objective are both long term and short term: "*Short term: in terms of physical development, the early enablers that will start the process are (a) the development of a new bridge to link the City Centre to the North Quays, (b) relocation of the railway station to a new Integrated Transport Hub on the North Quays and (c) development of the Abbey Link Road in Ferrybank. All 3 enablers support significant population and employment growth north of the river. All 3 enablers are identified in the RSES & MASP and both the New Bridge and Abbey Link Road are currently in the planning phase and could be ready to proceed in the next 2 years with funding. Long Term: in order to re-balance the city there will be a need for a high degree of co-ordination across the entire Metropolitan Area. The long terms goals include building additional river crossings to create sustainable movement networks across the metropolitan area, increasing north-south connectivity and creating attractive high-quality urban neighbourhoods with local amenities using LAP and Masterplan processes. As required under the NPF, 50% of all new housing within Waterford City and Suburbs is to occur within the existing city and suburbs footprint, through brownfield, infill and regeneration. Outside of Waterford City and Suburbs, 30% of all new homes that are targeted in settlements is to occur within their existing built-up footprints as per National Policy Objective 3 (c) of the NPF.*"

2.3.10 In terms of retail development, the Waterford MASP sets out the following policy objective:

"*Waterford MASP Policy Objective 19: Retail:*
a. Within one year of the adoption of the RSES/MASP a Joint Retail Strategy shall be prepared for the Waterford Metropolitan Area in accordance with the Retail Planning Guidelines. The Joint Retail Strategy shall include – inter alia- the defined area of the Core City Shopping Area, the location of Suburban or District Shopping Centres, a map to indicate sustainable travel routes to/from each shopping area which prioritise cycle and pedestrian access over cars.
b. It is an objective to protect and enhance customer experience of visiting Waterford City Centre through facilitating a mixed expansion of services including high order comparison retailing in conjunction with service, cultural and entertainment facilities through appropriate and sensitive redevelopment and infill development."

2.3.11 The MASP identifies that the city centre and inner urban areas will have a pivotal role in the development of the metropolitan area and wider city region, and that change will be driven by the focus on making the city centre more **accessible**, more **vibrant** and more **attractive.**

2.3.12 The MASP identifies that city centre should become more accessible through:

• New Bridges connecting the North Quays / wider North Shore & Ferrybank area to the City Centre;
• Relocated Railway Station located on the North Quays with more direct access to city centre on the south shore;
• Improved access into the City Centre for City Bus Services and improved services under the new contract with Bus Éireann with more Bus Priority on city streets and through neighbourhoods;
• The City Centre will link the existing Waterford Greenway to the planned Greenway to New Ross and planned Cycle route to WIT.

2.3.13 The city centre should become more vibrant through:
• Development of the North Quays adding a mix of uses at high density and creating a new city centre quarter on the north shore of the River Suir;
• Urban Regeneration to bring under used or derelict land and buildings in the city centre and inner areas back into residential use. The Regeneration will bring back more people into the City and a mix of uses which can provide flexible spaces for business and social enterprise, as well as arts and cultural uses;
• Active Land Management in the City Centre to support the regeneration process;
• Actions to deliver Arts and Cultural Space in the Cultural Quarterand growing Festival Activity bringing more people to the City;
• Actions to support and develop the primacy of the City Centre for Retail supported by a Joint Retail Strategy for the MASP Area between Kilkenny County Council & Waterford City and County Council.

2.3.14 The city centre should become more attractive through:

• Ongoing Public Realm works improving the quality of the urban environment to make the City more walkable and pedestrian friendly;

• Development of Tourism and Heritage facilities around the Viking Triangle and the House of Waterford Crystal.

2.3.15 The Waterford MASP also recognises the importance of the regeneration of the North Quays to vitality and prosperity of the city. The North Quays SDZ lands comprise 8.23 hectares and the SDZ Planning Scheme estimates that the site could accommodate a large scale mixed use development including retail, food, offices, hotel and leisure and c. 200 housing units. The MASP sets out the following objective for the North Quays:

"Policy Objective 9: Local Authorities and Public Bodies shall implement actions to support the extension of the City centre into the North Quays and develop a vibrant urban centre focused on the North Quays including priority for investment in the infrastructure to deliver New Bridges connecting the City Centre on the south bank of the River. All such development and infrastructure shall address brownfield and contaminated land issues and shall be subject to the outcome of environmental assessments and the planning process."

- a thriving, human–scale, cultural and social environment, concentrated around distinctive street patterns, mixes of restaurants, cafés, bars and attractive shops;
- a high quality physical setting in terms of sensitive conservation of structures of architectural heritage merit, contemporary architecture, street paving, formal and high quality public spaces and parks;
- pedestrian-friendly zones.

Conclusions

2.3.16 The policies of the Regional Spatial & Economic Strategy serve to channel population growth and development into a hierarchy of settlements. Whilst the south-east region has grown over the past number of years, it is highlighted that in Waterford this rate of growth was less than the average for larger urban areas across the region. The importance of retailing in the local economy is clearly acknowledged in the strategy as is the need to create dynamic, vibrant and highly accessible urban centres in order to encourage people to live, work and invest in the region. In this context, the primacy of Waterford City as the economic driver for the South East Region must be fostered, developed and enhanced to ensure that the region reaches the critical mass of population and targets set out in the Regional Strategy.

2.4 LOCAL PLANNING POLICY

2.4.1 At the City & County level, the plans and strategies, which have an influence, or will have an influence on the retail strategy are:

- Waterford City Development Plan 2013-2019
- Waterford Planning and Land Use Transportation Study (PLUTS) 2004-2020
- Waterford City Centre Report 2009
- Waterford North Quays SDZ Planning Scheme
- Waterford County Development Plan 2011-17
- Dungarvan Town Plan 2012-18

- Tramore Local Area Plan 2014-2020

Waterford City Development Plan 2013-2019

2.4.2 The City Development Plan sets out the then Waterford City Council's policies and objectives for the development of the City from 2013 to 2019. The plan seeks to develop and improve in a sustainable manner the social, economic, cultural and environmental assets of the city.

2.4.3 It is detailed that the City Centre needs to assert itself as the commercial and cultural capital of the region and the economic, social and physical core of the City. It is stated that the identification of strategic development sites for City Centre activities and the expansion of city centre uses, primarily retailing, forms an important element of the plan. It is outlined that the focus for new commercial development will be the city centre with major opportunities arising on the North Quays, Michael Street and Bolton Street.

2.4.4 The City Development Plan includes a whole chapter dedicated to retailing, which in turn is based on the 2012 City Retail Strategy. Of particular relevance to this report is the fact that the Plan sets out the current retail hierarchy for the City. This is shown at Box 2.1 below:

BOX 2.1: WATERFORD CITY DEVELOPMENT PLAN 2013-2019 RETAIL HIERARCHY

1. **The City Centre;**

2. **The District Centres at:**

   Ardkeen/Farronshoneen;
   Lisduggan;
   The Inner Relief Road/Tramore Road;
   The Hypercenter, Morgan Street
   Abbeylands in the northern environs in County Kilkenny.

3. **Neighbourhood centres at:**

   Cleaboy
   Kilcohan/Airport Road
   Ballinakill
   Carrickphierish
   Ballybeg
   A proposed site at Knockboy
   Ross Abbey Shopping Centre Ferrybank

4. **Corner shops & Forecourt Outlets;**

5. **Retail Warehousing.**

2.4.5 With regard to the City Centre, it is acknowledged that the City is the primary retail centre in the region and the focus for comparison retail development. It provides the main location for the sale of higher order comparison goods and is therefore at the top of the hierarchy in the region. It is stated that it is necessary, in line with the national guidance to protect the dominant position of the City Centre particularly for the sale of comparison goods.

2.4.6 It is the policy of the plan:

- To acknowledge the City Centre as the primary retail centre for high and middle order retail goods for the region and to protect and reinforce this role.
- To facilitate the expansion of, and improvement in the quality of the retail offer.
- To protect the retail function of the core shopping area.

2.4.7 The role of district/suburban centres is also acknowledged in the plan, and that they can perform an important function for the local community. The range and volume of comparison floorspace in District Centres should be of an appropriate scale, be confined to low and medium order comparison goods and should not compete with the City Centre.

2.4.8 The plan acknowledges the important role that neighbourhood centres have in serving a local shopping function and it is a policy of the plan to provide an adequate and appropriate scale of retail and other services within the existing and proposed neighbourhood centres.

2.4.9 With regard to retail warehousing, the plan anticipates that there will be no requirement for additional retail warehouse floorspace within the catchment up to 2022. This is not surprising having regard to the extent of retail warehousing floorspace recently developed and permitted within the Waterford City area.

2.4.10 The plan identifies the core retail area and states that the traditional core shopping area of the City Centre consists of Arundel Square, Barronstrand Street, Broad Street, Patrick Street, John Roberts Square, Georges Street, John Street, Michael Street and South Quays from Gladstone Street to Exchange Street. Secondary shopping streets include O' Connell Street and the South Quays west of Gladstone Street. It is the policy of the plan that the core shopping area will form the primary focus and preferred location for new retail development. Where it is not possible to provide for the form and scale of development that is required on a site within the core areas, then consideration can be given to sites on the edge of the core area.

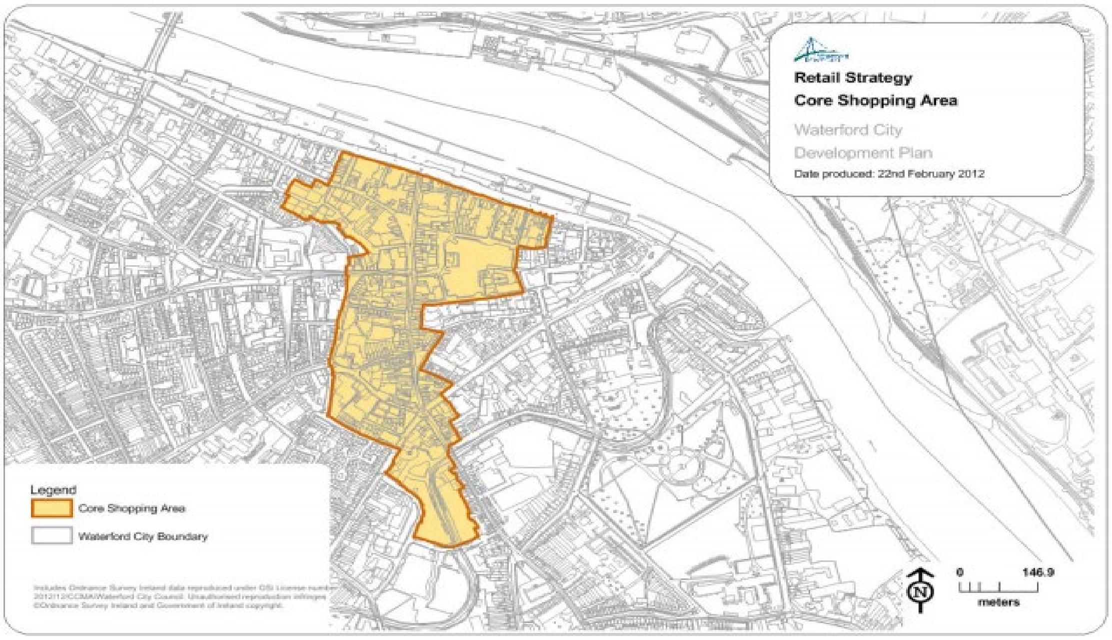


Figure 2.4 Definition of Waterford City Core Retail Area in City Development Plan 2013-19

2.4.11 The plan acknowledges that there is clear capacity for a substantial increase in comparison shopping floor space in the City Centre and that in order to encourage the scale of development required in the City, that there will be a clear presumption against comparison shopping development in the suburbs, other than for low order goods required to service local needs.

2.4.12 In terms of convenience floorspace, the plan details that the development of the existing district/suburban centres has catered for the floorspace requirements which arose during the plan period. The plan envisages that the development at Farronshoneen/Ardkeen and the redevelopment of the Lisduggan, Poleberry and Morgan Street Centres and the development of neighbourhood centres at Carrickphierish and Knockboy is likely to cater for the convenience requirement over the plan period.

2.4.13 The plan recognises the need to enable the City Centre to compete as a high level retail destination. The strategy requires the redevelopment of key sites within the plan period. This will entail restrictions on comparison retailing in the suburbs.

2.4.14 With regard to the core retail area it is the policy of the plan to:

- To ensure that the City Centre core retail area is the priority location for comparison retailing in the City Centre.
- To facilitate the expansion of the retail offer on the designated sites.
- To restrict ground floor uses on prime retail frontages, other than where it can be demonstrated that a proposal will not adversely affect the retail function or will contribute positively to evening vitality.

Waterford Planning and Land use Transportation Study 2004-2020

2.4.15 The Waterford Planning and Land Use and Transportation Study (PLUTS) was commissioned by Waterford City Council in February 2001 in order to provide a vision and strategy for the development of Waterford City and Environs up to the year 2020.

2.4.16 The PLUTS sets out a strategy that aims to provide guidance as to the general scale and location of growth of Waterford so that City and Environs can be developed in a balanced, sustainable and transport friendly and attractive way to provide a high quality of life and opportunities for all its citizens over the next 20 years.

2.4.17 Key elements of the PLUTS are:

- Provision for a population increase of almost 30,000 people (per 57% population growth) in Waterford City and Environs by 2020.
- Investment needed for almost 12,800 new jobs or 46% by 2020.
- Requirements for approximately 11,500 new dwellings located both north and south of the River Suir.
- Significant retail expansion in the expanding City Centre.
- A Downstream River crossing to facilitate the extension of the Outer Ring Road northwards to the N25.
- A new City Centre bridge for pedestrians and cyclists which will link the redeveloped north quays with the existing City Centre.
- Provision of a rail passenger platform on the North Quays as part of a new Public Transport Interchange.
- Development of a high quality bus based public transport system in the City supported by Park and Ride facilities located north and south of the River.
- Expansion and improvement of the South East Regional Airport with an extended runway, more operators and improved transport linkages.

2.4.18 The PLUTS Study recognises that the riverside location of Waterford City has not be harnessed to its full potential and recommends that it should be developed to create a new focus for the proposed spatial layout and to bring the North Quays and the Northern suburbs fully into the social and economic ambit of the City.

2.4.19 The PLUTS study details that the City Centre area will expand northward across the River into the North Quays and will be linked to the existing core by the new City Centre Bridge. The design concept of the bridge will focus on ease of access and movement for pedestrians and cyclists as well as providing shelter from the elements. It is stated that the extended City Centre will be the physical, social, retail and commercial focus for the urban area and will accommodate a significant proportion of the projected growth in jobs and services. It will also be the centre for leisure and entertainment with a specific emphasis on riverside amenities including the marina on the south quays. Improved public spaces and extended pedestrian areas will create an attractive ambience for both visitors and residents alike.

2.4.20 With regard to retail development, it is detailed that there will be a major expansion in retail floorspace in the City and Environs, particularly in comparison shopping floorspace. A significant proportion of this retail development will focus on the extended City Centre area including the redeveloped North Quays. Such expansion will be introduced in a phased and timely manner and will require a proactive and integrated approach on the part of the commercial community and civic authorities. A thriving commercial centre will be supported by urban design initiatives that will remove excess traffic from the City Centre.

Waterford City Centre Report 2009

2.4.21 The purpose of this report was to review the vitality, attractiveness and viability of Waterford City Centre as a place to shop, do business, work, live, spend leisure time and further develop and to set a direction for the City over the following number of years. In particular the report identified the centre's strengths and weaknesses and identifies further development opportunities as well as gauging what was required to improve its shopping attraction. An overall aim of the report was to provide a preliminary framework and guidance for future investment and outlines the mechanisms required to facilitate both enhanced direction and co-ordination of future investment for the City Centre.

2.4.22 The report detailed that notwithstanding its gateway designation, the City does not dominate its region like the other Gateway Cities and that in an increasingly competitive sub regional retail environment is vulnerable to increased retail competition from other large urban centres within the region. It also identified that retailing in the city had not expanded geographically beyond the existing traditional retail foci and that is attributable to the difficulty in identifying suitable large sites due to the fine historic urban grain in the City. It also detailed that while the existing core retail area of the City has many attractions and advantages in order to sustain and expand its competitive appeal into the future requires enhanced shopping attractions, including ideally one or a number of new larger department variety and/or multiple stores sited in central locations. It highlighted that such developments are likely to act as catalysts for further development.

2.4.23 The report highlighted the infrastructural improvements in the City and whilst it acknowledged that these key regional infrastructural projects expand the catchment area of the City, they also facilitate ease of movement of consumers and a haemorrhaging of comparison shoppers to the capital or other centres on a more frequent basis. In this regard the report stated *"the importance of improving the City Centre's attraction through upgrading the quality of our retail offer cannot be over emphasised."*

2.4.24 The report included a detailed City Centre retail analysis. It detailed that middle order comparison retailing completely dominates the comparison sector. This is in contrast to other Gateway Cities such as Cork and Limerick. The City lacks floor area sizes in demand by multiple retail outlets. This in particular inhibits chain fashion retailers from displaying their full product range. The high streets that are represented tend to occupy smaller than normal floorplates. The study noted that in the absence of the proposed Newgate development (a major new City Centre proposal permitted but not constructed), the city centres current supply of retail floorspace is not managing to keep up with the increase in retailer need. In this regard, a priority for the City is to be in a position to offer larger floor plates to both existing and prospective retail tenants. The study noted however, that the City retail core has a healthy spread of independent fashion retail outlets which contributes to the diversity of comparison retail offer and ultimately the overall retail attraction of the centre.

2.4.25 In terms of accessibility, the report noted that the City has many positives, in that it is a rail transportation hub, has excellent motorway access and generous car parking provision, with approximately 2,600 car parking spaces in close proximity to the City Core. The report detailed that the South Quays parking provision is considered a significant advantage for the existing retail core, although there is scope to improve the overall environment there . In this regard, measures such as traffic calming along the quays were identified as a means to further enhance the attraction of the retail core to major retailers. The report included a number of strategic objectives including:

- To promote a sustainable City Centre through the provision of an integrated transportation system in the City. The creation and active promotion of sustainable and public transport links to the heart of the City Centre that are on time, easily accessible from suburban locations, clean, safe, environmentally responsible and affordable.
- Offer an attractive, legible, informative, safe and traffic controlled environment, with easy access to sufficient off street parking, in order to provide a hassle free experience for motorists when entering the City Centre for business or pleasure.
- To aid the enhancement of a pedestrian core within the City Centre.
- To review the existing inner city transport route with a view to facilitating the removal of non essential traffic from the central core and to provide a more efficient public transport.
- Review the Waterford Planning Land Use Transportation Strategy in 2010.
- To upgrade the main access roads to the City Centre.
- To support the provision of additional off street parking spaces adjacent to the orbital route.
- To provide dedicated bicycle parking within the City Centre.
- To examine the feasibility of the expansion of dedicated green routes within the City.
- To examine the feasibility of park and ride service from main access routes.
- To encourage the use of underground car parking where appropriate and possible.
- To introduce a real time variable messaging system for approached to the City Centre.
- Introduce a HGV/delivery strategy for the City Centre.
- Implement access for all ages – Barcelona Declaration.

Archaeology

2.4.26 The report identified the challenges of reconciling new development or redevelopment proposals in the City with archaeological issues.

2.4.27 The report outlined that the issue of conservation and archaeological resolution is often seen as a constraint to developers, yet new developments have proceeded or successfully gone through planning in the last number of years. Many of these schemes incorporated the archaeological heritage on site using them to add uniqueness and identity to the project.

City Priorities

2.4.28 The report identified a number of priorities for the City. It is detailed that the City requires maximising of its assets and focussing on creating a City Centre which has a strong economy, a high quality environment, improved connections to the waterfront, an attractive mix of uses and top quality shopping. Key priorities include:

<u>Building a competitive City Centre economy:</u> It is necessary to provide a range of shopping experience in a comfortable, user friendly environment, concentrating activity into the core retail area.

<u>Create a quality regional shopping centre:</u> It is essential to have at least one quality shopping centre with high order retail anchor or anchors that has a regional appeal.

<u>Achieve a high quality environment:</u> An easily traversable top class public realm is a pre-requisite in destination cities.

<u>Develop city living:</u> The objectives is to attract a cross section of the community to live close or in the City Centre by encouraging a range of residential unit types close to cultural infrastructure, leisure facilities and services.

<u>Making a waterfront city:</u> Any successful plan for the City Centre must acknowledge the fact that Waterford is focussed on the river, which can be used to connect important activities on a broader scale and to place the City Centre in its context. The south quays are the shop window to the City, and in relation to the City Centre Retail Core, the immediate priority is the area around the clock tower. The development of this zone should be used to signify the City Centre, to improve legibility and identify to visitors the commercial heart of the City.

<u>Improving accessibility and movement:</u> Ease of access to the City Centre is critical. It is an objective of the plan to investigate the potential to underground some of the south quays car parking areas and affording the north quays an opportunity to cater for a park and ride service and/or substantial car parking.

<u>Creating a destination city:</u> Waterford has the raw material and platform with which to synthesise a destination status over a period of time. Attractions include a vibrant City Centre and visitor attractions that are recognised nationally and internationally in the Viking Triangle and Waterford Crystal.

<u>Affirming a regional role:</u> Here the emphasis is on the ongoing need to affirm the

City's regional role. As a leader within its region for delivery of all services.

Expressing a distinctive identity: The development of a distinct identity is a tenet in drawing visitors keen on discovering unique places that have interesting layouts, design and history and that can creatively inform.

Management Framework: From a structured approach to managing the City Centre through to integration of cultural events, artistic displays and promoting and branding the City, the development of a management framework has been identified as a key driver in pulling together the disparate activities and groups required to give coherence and integration to the delivery of a strategy for the City Centre.

2.4.29 It is detailed that in order to achieve these strategic objectives leads to several priority themes including:

- Strengthening the City Centre retail core and developing it as a regional shopping attraction through intensification and diversification of retail space, promoting better visibility from the quays and continuing to improve the public realm and its overall shopper friendliness.

- Transformation of the N25, following the opening of the City Bypass, from its current perception as a physical and psychological barrier to an aesthetically enhanced traffic calmed boulevard. It in turn also facilitating the better union between the quays and eastern districts with the CCRC.

- Reinventing the south quays and its use to signify the centre and deliver visual information about the City.

- Delivering the Viking Triangle on a staged basis to provide the cultural/historical counterweight to the retail core. The Viking Triangle is seen as vital in promoting the national identity of the City.

- Develop complementary districts with strong and distinctive characters, and different functions to complement each other and reinforce the strength of the city core.

2.4.30 The report went on to identify a number of opportunity sites for redevelopment in the City. It detailed that the basic concept is to concentrate as much shopping offer as possible in to the retail core to give it a critical mass as a shopping regional centre. The more compact the core, the more attractions there are in a given area with consequent improvements in vibrancy. A tandem concept was to improve and add to the permeability of the core by adding new routes and proposing solutions to the quays around the clock tower that spread the footfall across a wider section to the Quays than just at the Clock.

Conclusions

2.4.31 The study concluded by identifying that the current balance between the City Centre of Waterford and retail decentralisation is somewhat uneasy and potentially volatile. It outlined that the level of decentralisation to key nodes in the suburbs needed to be controlled to prevent adverse impacts on the City Centre. It is also highlighted that retail planning decisions taken outside the jurisdictional boundaries of Waterford City & County can equally have an adverse impact on the City Centre. Furthermore, the other major urban centres within the South East Region are becoming stronger with improvements in road infrastructure, critical mass, quality retailing environments and stronger tenant mixes. Their strengthening implies an increased capacity to draw from the primary trade area of Waterford City.

2.4.32 It detailed that the City required more higher quality variety stores as these enhance retail attraction and stimulate other retailers to co-locate. There is further capacity within the core retail area for larger floor plates, which in turn would consolidate the retail core. However, in order to bring such potential to fruition, site assembly should be resolved.

2.4.33 In order to enhance the attractiveness of the City Centre, accessibility for both public and private transport in conjunction with improved car parking provision and general traffic/transport management is required.

North Quays SDZ Planning Scheme 2018

2.4.34 The Planning Scheme sets out a broad vision for the development of the North Quays and sets out a development framework and urban design guidelines. The vision for the area is to create a sustainable, modern and innovative new City Centre quarter acting as a gateway to the City with the opportunity to connect the City Centre and Ferrybank, where a rich quality of life and unique sense of place can be experienced by residents and workers alike.

2.4.35 In terms of land use it is detailed that a range of complementary land uses will be considered and that in general active ground floor uses will be preferred with a mix of residential and commercial uses overhead. It is an objective of the plan to ensure an overall use mix across the area of 30% residential and 70% commercial/non residential based on land area. The planning scheme proposes a new bridge which will provide easy access to the city centre area., and also the relocation of the train station into the centre of the North Quays as part of a new integrated transport hub.

Waterford County Development Plan 2011-2017

2.4.36 The County Development Plan has a section (Section 6.10) devoted to Retail. This is based on the County settlement hierarchy which identifies:

- Primary & Secondary Service Centres
- District Service Centres
- Local Service Centres

2.4.37 The policies on retailing were based on the Waterford County Retail Strategy 2003 and which was reviewed in 2005 and makes projections for retail floor space requirements for both convenience and comparison goods shopping up to 2011. Of most relevance to this strategy is the designation in the Plan of the County Retail Hierarchy.

2.4.38 The purpose of the Retail Hierarchy is to indicate the role and importance of the various urban centres of the County in order to enable the Council to protect each centre's overall vitality and viability whilst allowing each centre to perform its overall function within the County's settlement hierarchy. Identifying key centres which can accommodate major retail floorspace assists the market by bringing certainty and thus improving the County's competitiveness.

County Retail Hierarchy	
Level/Retail Function	**Centre**
Level 1: County Town Centre	Dungarvan
Level 2: Sub County Town Centre	Tramore
Tier 1 Level 3: Town Centre	Dunmore East Lismore Cappoquin
Tier 2 Level 3: Town Centre	Kilmacthomas Portlaw Tallow
Level 4	All Other Local Service Centres
Level 5	All Settlement Nodes

Table 6.1 County Retail Hierarchy

Dungarvan Town Council Plan 2012-2018

2.4.39 The Dungarvan Plan does not set out any retail policies specific to Dungarvan but refers to the overall County retail strategy and policies there-under and the importance of protecting the primacy of the town centre and the requirement to apply the sequential test.

Tramore Local Area Plan 2014-2020

2.4.40 The Tramore LAP sets out the following policies for retailing in the town:

- *Policy ETD 3 To promote and encourage the enhancement and expansion of the retail floorspace and Town Centre functions of Tramore and to develop its competitiveness through a plan led approach, consistent with the Retail Planning Guidelines 2012.*
- *Policy ETD 4 To address leakage of retail expenditure from the Town and its catchment through the appropriate zoning of land for retail/commercial development.*
- *Policy ETD 5 Promote the reuse and regeneration of derelict land and buildings in Tramore for retail development where appropriate.*
- *Policy ETD 6 To consolidate the traditional Town Centre and to strengthen linkages between the retail areas of the Town and between the promenade and the Town Centre.*

- *Policy ETD 7 To promote the sustainable use of vacant upper floors of Town Centre buildings for residential use.*
- *Policy ETD 8 Require a high standard of design for all new Town Centre development and the refurbishment of existing properties, taking account of the natural and built heritage of the Town to ensure developments enhance and respect the character and setting of Tramore.*
- *Policy ETD 9 The Council shall have regard to the County Retail Strategy (or any revision of same), the Retail Planning Guidelines and accompanying Retail Design Manual (2012) when guiding retail development in Tramore.*

Conclusions

2.4.41 A review of the City & County planning policy reveals that Waterford City, although the principal urban centre to the region, is underperforming in terms of its retail role and function. It is evident that the City is facing increased competition from other urban centres, both in the region and nationally, and is also experiencing pressure from retailers seeking larger and flexible retail formats in the suburban areas of the City and in the larger towns. There are clear objectives in both the City Plan and the Town Plans for Dungarvan & Tramore to promote the city/town centres and inhibit the spread of high order retailing out of the city/town centres.

2.4.42 The Waterford City Centre Report sets out a clear strategy and vision for the future development of the City. The strengths and weaknesses of the City are clearly identified and key opportunity sites for major retail expansion and development are assessed. It is clear that, whilst Waterford City has a very attractive and active city centre, there is room for improvement particularly in terms of retail representation, access and further improvements to the streetscapes and public realm. There is scope for the consolidation and enhancement of the city centre and for it to become a major retail destination in the region.

2.4.43 In relation to the other main urban centres in the County, both the County Development Plan and the Dungarvan town plan identify an important role for Dungarvan in meeting the retail needs for its extensive catchment area in west Waterford. In relation to Tramore, given its close proximity to Waterford city, its primary retail function is to serve the convenience needs of its resident and visitor population.

CHAPTER 3

Economic Context and Current Trends in Retailing

3.1 INTRODUCTION

3.1.1 In setting out the retail strategy for the City & County, it is important to have regard to the economic context at a national, regional and local level as current and projected economic growth can have a profound effect on factors such as expenditure change and thus on the nature and quantum of retail development that occurs.

3.1.2 This section of the report therefore outlines the national, regional and local economic context. This section also sets out recent trends in retailing in Ireland which will influence future development. Retail trends are intrinsically linked to the economic context.

3.1.3 Sources for this section include the Central Statistics Office (CSO) publications, most notably the 2016 Census of Population and the Retail Sales Index, ESRI publications such as Quarterly Economic Commentary, the National Planning Framework and the Regional Spatial & Economic Strategy for the Southern Region. The information relating to retail trends is sourced from a combination of in-house experience in retail development and a review of the relevant planning policy context, and through a review of national and international literature on trends in retailing.

3.2 NATIONAL CONTEXT

3.2.1 After a number of difficult years in the 2010's following the deep recession in 2008, the last number of years have seen a steady improvement in the Irish economy. According to the ESRI in their summer 2019 Quarterly Economic Commentary, while a number of international concerns continue to cast a shadow on the domestic economy, both taxation receipts and labour market indicators suggest that the Irish economy continues to perform strongly in 2019. Output is still forecast to grow by 4.0 per cent in 2019 before moderating somewhat at 3.2 per cent in 2020. Unemployment is set to fall to 4.5 per cent by the end of 2019 and to 4.1 per cent at the end of 2020.

3.2.2 While the performance of the economy continues to exceed that of most other European countries, it is subject to heightened levels of uncertainty. Consumer and producer sentiment indices have all reported significant declines in investor confidence about future prospects for the Irish economy. Inevitably, much of this uncertainty reflects the ongoing process of the UK withdrawal from the European Union.

3.2.3 Set out below in Table 3.1 is a summary of key economic indicators for Ireland over the last three years, taken from the ESRI's Quarterly Economic Commentary from summer 2019. This indicates that the country's GDP has increased each year since 2016 between 4% & 7%. For 2020 the ESRI are predicting this growth rate would moderate to 3.2%. Similarly, the Consumer Price Index has risen by 1.4%, while the unemployment rate has fallen from 8.4% to 4.5%, which would be considered full employment.

Table 3.1 Economic Performance Indicators for Ireland

SUMMARY TABLE

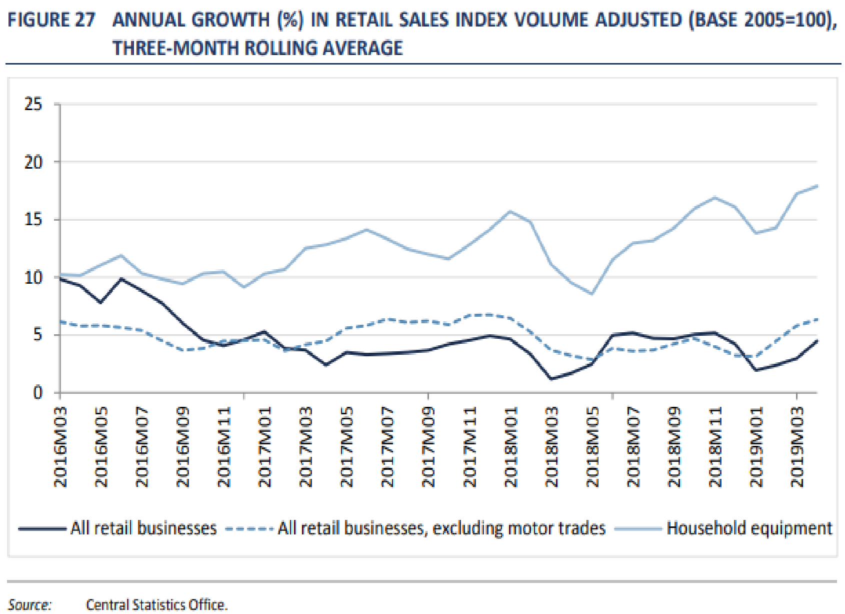
	2016	2017	2018	2019	2020
Output (Real Annual Growth %)					
Private Consumer Expenditure	4.0	1.6	3.0	2.5	2.3
Public Net Current Expenditure	3.5	3.9	6.4	7.0	5.3
Investment	51.7	-31.0	9.8	7.1	7.6
Exports	4.4	7.8	8.9	4.2	4.3
Imports	18.5	-9.4	7.0	6.0	5.9
Gross Domestic Product (GDP)	5.0	7.2	6.7	4.0	3.2
Gross National Product (GNP)	11.5	4.4	5.9	3.4	2.6
Prices (Annual Growth %)					
Consumer Price Index (CPI)	0.0	0.3	0.5	1.4	1.7
Growth in Average Hourly Earnings	2.5	1.5	4.2	4.4	4.6
Labour Market					
Employment Levels (ILO basis ('000))	2,133	2,195	2,250	2,324	2,375
Unemployment Levels (ILO basis ('000))	195	158	145	110	102
Unemployment Rate (as % of Labour Force)	8.4	6.7	5.7	4.5	4.1
Public Finance					
General Government Balance (€bn)	-1.8	-0.8	0.0	-0.7	-1.2
General Government Balance (% of GDP)	-0.7	-0.3	0.0	-0.2	-0.3
General Government Debt (% of GDP)	73.5	68.5	64.8	62.8	58.0
External Trade					
Balance of Payments Current Account (€bn)	-11.4	24.9	29.0	23.2	18.5
Current Account (% of GNP)	-5.1	10.7	11.5	8.8	6.7

Note: Detailed forecast tables are contained in an Appendix to this Commentary.

Source: ESRI Quarterly Economic Commentary Summer 2019

3.2.4 In terms of retail sales, the ESRI Quarterly Commentary includes a section on trends in retail sales, and this is well captured in their Figure 27 which has been reproduced here, as Figure 3.1. This chart presents a three-month rolling average of annual growth of total retail sales, sales excluding the motor trade, and sales for household equipment. Retail sales (both including and excluding motor sales) continue to perform strongly. The growth in household equipment sales remains well above the average of all retail sales, with the three-month rolling rate up 17.9 per cent in April 2019. As previously noted, this is likely driven by the continued increase in housing market activity. Given the uncertainties facing consumers in the Irish economy, in particular with Brexit, it may have been expected that retail sales growth would have moderated through late 2018 and into 2019. While this does appear to have happened up to February 2019, the March and April updates suggest a pick-up in retail sales and a further acceleration in the growth rate. This may be driven by improvements in the labour market outweighing any concerns due to uncertainty or some pent-up demand being released with greater certainty emerging on Brexit.

Figure 3.1: Annual Growth in Retail Sales Index



Source: ESRI Quarterly Economic Commentary Summer 2019

3.2.5 While consumer sentiment grew much more strongly in Ireland than elsewhere in the period 2014-2017, the ESRI noted that mid- to late-2018 consumer sentiment has been falling. This suggests that Irish consumers became more fearful as the Brexit deadline drew to a close without a deal. A similar pattern is also evident in the UK. The most recent data point for May 2019 provides some respite with a pickup in sentiment occurring in Ireland, the UK and EU. This may have been driven by the postponement of the Brexit deadline to October 2019 giving time for negotiations to continue.

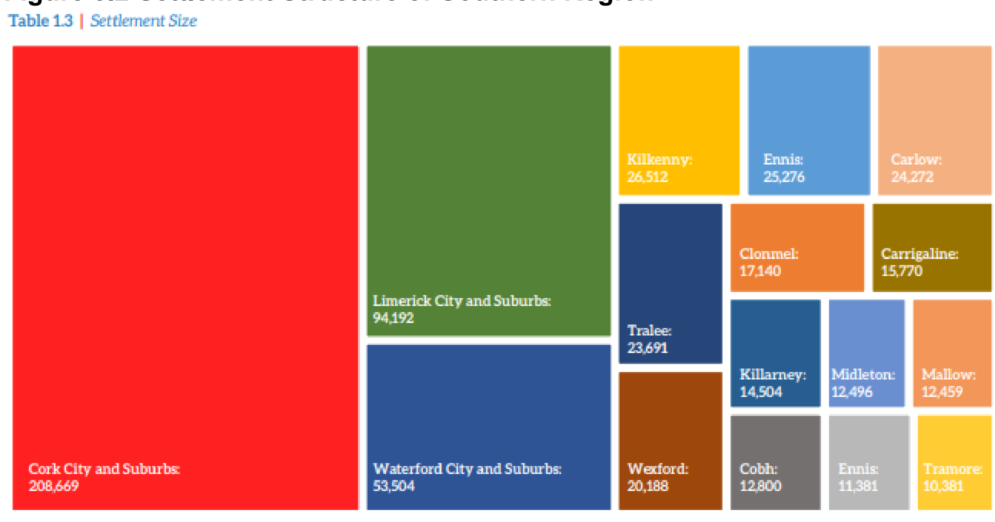
3.2.6 What is interesting is that as the country gets richer, the proportion of incomes spent on goods – particularly basics such as food – continues to fall. For example, in Ireland we spent nearly €1 in every €3 of disposable income on food in 1980, today it is dropped to around €1 in every €7. And within today's population, people on better incomes tend to spend a higher proportion on their incomes on services, while lower income groups spend more on goods.

3.3 REGIONAL CONTEXT

3.3.1 Waterford is located in the South-East region, which is part of the wider NUTS II Southern Region. With one-third of the State's population (1.58m), the Southern Region is the second most populated Regional Assembly area and all local authority areas have experienced growth since 2006 (albeit at differing levels). The highest rates of population increase between 2006 and 2016 are in commuter areas near to Cork and Limerick Cities and in areas close to other larger settlements. Wexford town and areas close to Gorey witnessed large increases linked to population growth associated with the Dublin Metropolitan and commuter areas. Population decline was seen in 402 Electoral Districts (27%), mostly in rural and peripheral areas, with largest decreases in areas of Clare, Kerry, Limerick and Cork. Population decline is also evident in some areas within the cities of Cork, Limerick and Waterford.

3.3.2 The Southern Region boasts a strong network of urban centres with cities (Cork, Limerick and Waterford), in each of the three Strategic Planning Areas, and thirteen larger settlements with populations more than 10 thousand people. In 2016, the three cities and suburbs accounted for 22% of the Region's total population. Growth in the cities and suburbs outpaced overall Regional and State level growth between 2011-2016 (2.9% and 3.8% respectively), showing encouraging signs that our cities are strengthening their population base. The 10,000+ population towns function as strong urban entities, fulfilling critical economic and social roles for their respective hinterlands.

Figure 3.2 Settlement Structure of Southern Region



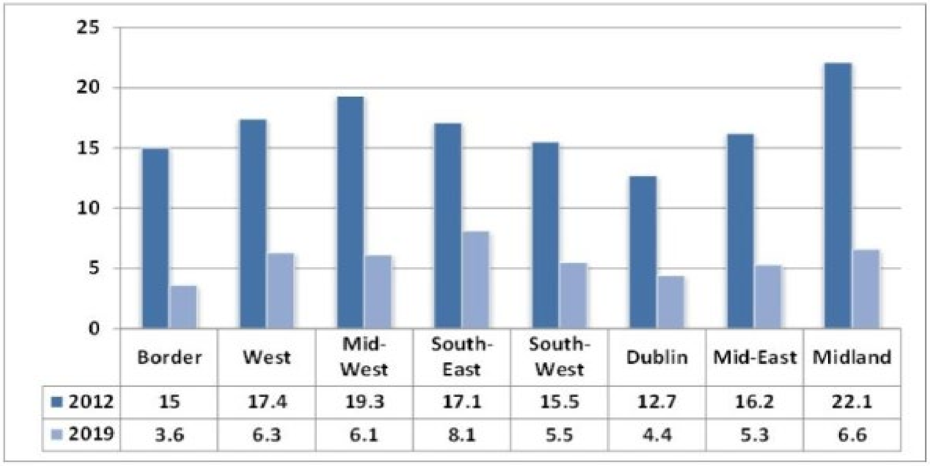
Source: Southern Region RSES 2019

3.3.3 The Regional Spatial & Economic Strategy for the Southern Region estimates that the population of the South-East in 2019 was c. 509,500 (10.7% of the national population). Within this, the population of Waterford City & County is circa 22.8% of the south-east region's population.

3.3.4 The RSES describe that the regional economy of the South-East as being based primarily on agriculture, manufacturing and services, tourism, fishing and aquaculture. The agriculture and food sectors account for a significant proportion of output and employment, with the region having a higher than average reliance on this sector.

3.3.5 It is also of note that the South-East has the highest rate of unemployment in the country at 8.1% for the period end Quarter 2 2019, well above the national average of 4.8%. This is illustrated in the two Figures below which show the unemployment rates for each NUTS III region for 2012 and Q2 2019 and also the rate of employment growth over this period, which graphically illustrates the rapid employment growth in the Dublin region relative to the rest of the country.

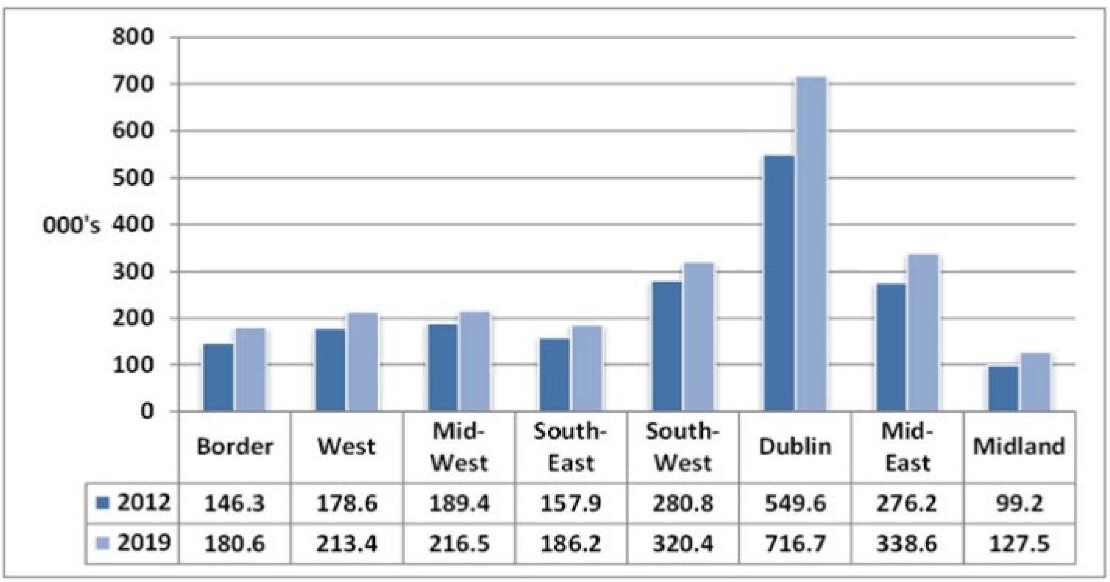
Figure 3.3 Unemployment rates for persons aged 15-74 tears by NUTS III Region 2012 & 2019 Q2



	Border	West	Mid-West	South-East	South-West	Dublin	Mid-East	Midland
2012	15	17.4	19.3	17.1	15.5	12.7	16.2	22.1
2019	3.6	6.3	6.1	8.1	5.5	4.4	5.3	6.6

Source: CSO (2019a)

Figure 3.4 Persons aged 15 year and over in employment 2012 & 2019 Q2



	Border	West	Mid-West	South-East	South-West	Dublin	Mid-East	Midland
2012	146.3	178.6	189.4	157.9	280.8	549.6	276.2	99.2
2019	180.6	213.4	216.5	186.2	320.4	716.7	338.6	127.5

Source: CSO (2019a)

3.4 COUNTY WATERFORD

3.4.1 County Waterford is a coastal county located in the south-east of Ireland, bordering the counties of Cork, Kilkenny, Tipperary & Wexford. The County is predominantly rural in character. The Waterford City area (former city council administrative area) extends to an area of 4,157 hectares, of which 288 hectares is covered by water – the Suir and its tributaries.

3.4.2 County Waterford recorded a population of 116,176 in 2016, representing a growth of 2.1% from 2011. This growth is below the national average of 3.8%, although it is notable that the percentage increase for Waterford City was higher at 3.2%.

3.4.3 Waterford City is by far the largest settlement in the County of Waterford. Outside the City, the largest towns are Dungarvan & Tramore both of which have populations of just over 10,000. Below this tier there are just three towns with populations over 1,000 namely Dunmore East and Portlaw in the east of the county and Lismore in the west, all within a population range of 1.300 -1,800 in Census 2016. This illustrates how relative rural the county is, particularly west Waterford.

3.4.4 Set out below are a series of tables taken from the 2016 Census of Population which summarise the position of Waterford City & County relative to the State across a range of socio-economic variables.

3.4.5 Table 3.2 indicates that Waterford has a higher than national average proportion of persons in the 50-60, 60-79 and 80+ cohorts, and lower in the 20-30, 30-40, & 40-50 cohorts which has implications for the active labour force.

Table 3.2: Census of Population 2016 Statistics for Waterford County & State

		Waterford County		**State**	
		Households/ Persons	**Percentage**	**Households/ Persons**	**Percentage**
Personal Computer	Yes	29066	66.9	1160603	68.4
	No	12880	29.6	478487	28.2
	Not Stated	1509	3.5	58575	3.4
Total		43455		1697665	
Internet Access	Broadband	29801	68.6	1200067	70.7
	Other	3616	8.3	131676	7.7
	No	8595	19.8	312982	18.4
	Not stated	1443	3.3	52940	3.1
Total		43455		1697665	
		Waterford No.	**County %**	**State No.**	**%**
Persons at work by industry	Agriculture, forestry and fishing	2,589	5.7	89,116	4.4
	Building and construction	2,052	4.5	101,849	5.1
	Manufacturing industries	7,418	16.3	229,548	11.4
	Commerce and trade	9,513	20.9	480,117	23.9
	Transport and comm.	2,383	5.2	171,194	8.5
	Public administration	1,979	4.3	106,797	5.3
	Professional services	11,535	25.3	471,656	23.5

	Other	8,126	17.8	356,364	17.8
Total		45,595		2,006,641	
Persons by socio economic group	A Employers and managers	15,234	13.3	722585	15.5
	B Higher professional	7,196	6.3	330313	7.1
	C Lower professional	12,256	10.7	548805	11.7
	D Non Manual	19,837	17.3	841337	18.0
	Manual Skilled	11,284	9.9	436768	9.3
	F Semi skilled	12,246	10.7	403657	8.6
	G Unskilled	4,735	4.1	167976	3.6
	H Own account workers	5,524	4.8	243997	5.2
	I Farmers	5,824	5.1	227052	4.9
	J Agricultural workers	865	0.8	25141	0.5
	Z All other gainfully occupied and unknown	19,401	17.0	729017	15.6
Total		114,402		4676648	
Population aged 5+ journey time to work, school or college	Under 15 mins	28277	40.9	956370	32.3
	1/4 hour - under 1/2 hour	22568	32.6	853885	28.8
	1/2 hour - under 3/4 hour	7607	11.0	511843	17.3
	3/4 hour - under 1 hour	2296	3.3	174254	5.9
	1 hour - under 1 1/2 hours	2280	3.3	179233	6.0
	1 1/2 hours and over	1116	1.6	67066	2.3
	Not stated	5030	7.3	219899	7.4
Total		69174		2962550	
		Waterford No.	**County %**	**State No.**	**%**
Population aged 5+ means of travel to work, school or college	On foot	9508	13.2	426221	13.9
	Bicycle	979	1.4	82123	2.7
	Bus. Minibus or coach	4477	6.2	313097	10.2
	Train, DART or LUAS	123	0.2	82627	2.7
	Motorcycle or scooter	162	0.2	8565	0.3
	Car driver	30918	43.0	1202441	39.3
	Car passenger	16821	23.4	570254	18.6

	Van	2798	3.9	128310	4.2
	Other (incl. lorry)	285	0.4	11917	0.4
	Work mainly at or form home	2743	3.8	96057	3.1
	Not stated	3103	4.3	136995	4.5
	Total	71917		3058607	
Population aged 15+ by age education ceased	Under 15 years	4234	5.5	184266	5.9
	15	4015	5.3	124642	4.0
	16	6582	8.6	226150	7.3
	17	5913	7.7	217663	7.0
	18	8977	11.8	358642	11.6
	19	2881	3.8	122278	3.9
	20	2674	3.5	117591	3.8
	21 and over	16442	21.5	757567	24.5
	Not stated	24596	32.2	988253	31.9
	Total	76314		3097052	
Population aged 15+ by highest level of education completed	No Formal Education	1279	1.7	52214	1.7
	Primary Education	8615	11.3	334284	10.8
	Lower Secondary	12680	16.6	449766	14.5
	Upper Secondary	14510	19.0	573643	18.5
	Technical or Vocational qualification	7073	9.3	271532	8.8
		Waterford No.	**County %**	**State No.**	**%**
	Advanced Certificate/Completed Apprenticeship	4925	6.5	182318	5.9
	Higher Certificate	3758	4.9	153351	5.0
	Ordinary Bachelor Degree or National Diploma	5270	6.9	237117	7.7
	Honours Bachelor Degree, Professional qualification or both	7385	9.7	331293	10.7
	Postgraduate Diploma or Degree	5291	6.9	284107	9.2

	Doctorate(Ph.D) or higher	567	0.7	28759	0.9
	Not stated	4961	6.5	198668	6.4
Total		76314		3097052	

Source: CSO Census 2016

3.4.6 In terms of educational attainment, Waterford City compares favourably to State percentages when assessing primary and secondary education. However, percentages of third level education are below State averages, and this is reflected in the figures for County Waterford.

3.4.7 In terms of social class, the above Table indicates that Waterford City & County has only 7.6% of professional employees, against a State average of 8.1%, and also has a well below average percentage of managerial and technical employees. The figures shown above demonstrates that Waterford has a higher than average dependency on manufacturing, agriculture, forestry and fishing for employment.

3.4.8 In terms of factors which can have a direct impact on people's retail behaviours it is worth noting that Waterford has lower than State average ownership of personal computers and access to internet, which may dampen expenditure on on-line shopping in the county. Waterford also has a relatively higher number of 1 and 2 person households than the state average.

3.5 RETAIL TRENDS

3.5.1 It is important to be able to recognise and respond to the key trends in retailing in formulating a retail strategy.

General Trends in Retailing

Leisure Use Integration and Extended Opening Hours

3.5.2 Shopping has become interlinked with social and leisure activities, and in particular food and beverages uses. This is evident in the extension in the range of facilities now on offer in shopping centres. This integration of leisure, food & beverage and retail use is particularly evident in Dundrum Town Centre in Dublin where the retail sector forms part of a wider mix of leisure facilities including a cinema, theatre and a variety of restaurants which front onto the central plaza. The number of restaurants is currently being expanded.

3.5.3 The permitted Michael St/New Street development in Waterford City includes a number of leisure uses and shows the importance of providing a mix of retail, leisure and other complementary facilities in ensuring the success of a centre.

3.5.4 This mix of uses has the potential to add to the life and vitality of the town/city centre and increase the overall attractiveness of the centre. The inclusion of additional leisure activities to shopping centres does have the benefit of increasing activity in shopping areas, bringing vitality and vibrancy. It can also increase activity to the centre after normal shopping times.

3.5.5 The integration of leisure and retailing is constantly evolving and developing. A new concept that is emerging is what can be termed 'experience retail'. This can be described as facilities which seek to provide a much more sophisticated offer to consumers than traditional retail centres, by providing innovative forms of delivering the retail experience together with leisure, entertainment, eating and drinking and cultural experiences. At the heart of experience retail is the need to differentiate the offer by providing a unique mix of retail, culture, sport, leisure, events, activities and services that are appropriate for the market and cannot be replicated elsewhere.

Internet Shopping

3.5.6 According to the 2018 PWC report (see Section 3.6 below) 38% of 25-34 year olds in Ireland now shop weekly on-line, and this figure is continue to grow and expand into the older age cohorts.

3.5.7 Home shopping traditionally took the form of catalogue / mail order shopping but has now diversified into internet shopping in recent years. This form of retailing is particularly suited to non bulky comparison goods, such as books, footwear and clothing. It is envisaged that the proportion of retailing carried out online is likely to increase in the coming years.

3.5.8 For the first time the 2019 Retail Sales Index published by the CSO in January 2020 contains specific data in relation to on-line sales by Irish stores. The RSI found that for 2019 on-line sales by retailers based in Ireland was estimated to account for 3.3% of total retail sales. This does not include online purchases from abroad. For electrical goods the online share was 13% and for footwear & clothing the share was 7.3%

3.5.9 Online convenience retailing is still in its infancy here in Ireland, but has been increasing slowly in popularity in recent years with food retailers such as Tesco Ardkeen and Supervalu providing a home delivery facility to consumers.

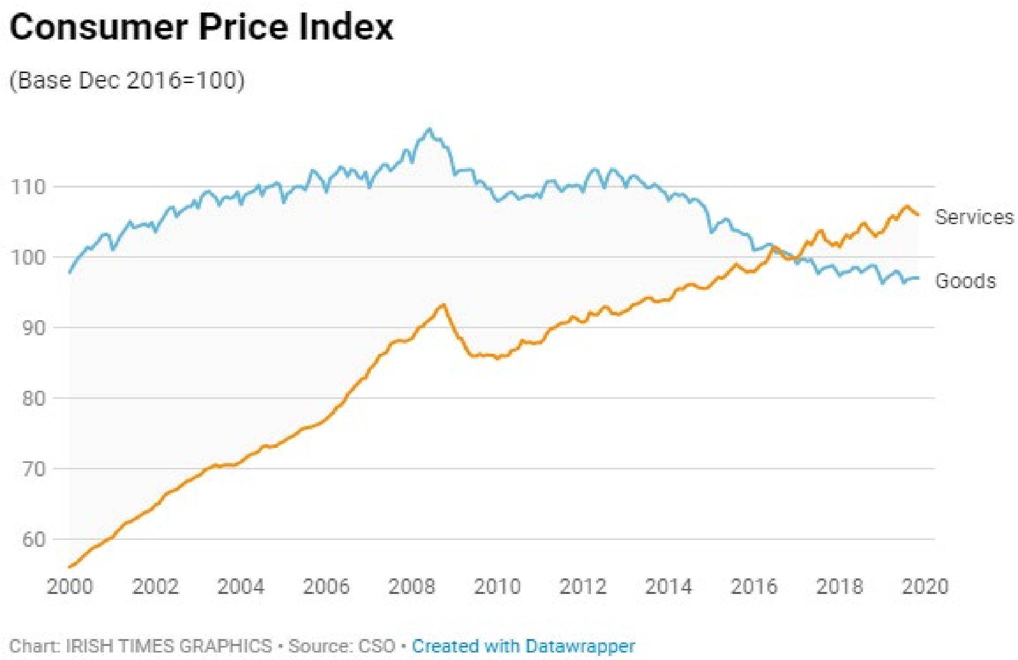
Convenience Retailing

Declining Costs of Retail Sales

3.5.10 A noticeable recent trend has been the reversal of the long-term trend of inflation in the price of retail goods as based on the Consumer Price Index. Since 2008, inflation or change in real prices of goods has fallen by in excess of 10% overall. This is particularly noticeable in categories such as clothing and footwear where the fall is in excess of 15%. This compares with continued inflation in respect of services.

3.5.11 The fall in the retail price of goods has risen from increased competition, both within the shop-based retail sector and from online retailing as well as reduced costs globally of products. This means that whilst the volume of goods sold has continued to increase, the actual turnover of retail nationally has remained largely static over the last 10 years or so. This is reflected and further discussed below in the Quantitative Assessment, and is shown graphically on Figure 3.5 below.

Figure 3.5 Changes in Consumer Price Index 2000-2020



<u>Convenience Retailing</u>

3.5.12 There is a marked change in trends in convenience retailing in the past 10 years compared with the previous decade. In particular, there has been a very significant reduction of development of new larger convenience stores throughout the country.

3.5.13 Up to 2008 there had been a trend towards larger size supermarkets and hypermarkets. In excess of 2000 square metre net sales have been developed in the past 10 years across the country.

3.5.14 New development being of much reduced scale and pace has focused on firstly, continuing expansion of discount foodstores and secondly, development of smaller stores within urban neighbourhoods, serving a more localised catchment, together with continued expansion of convenience stores of a small scale attached to petrol filling stations.

3.5.15 The latter is particularly prevalent in smaller towns.

3.5.16 The pace of discount food stores is also easing off as they are approaching maturity in terms of representation nationally, although they are continuing to expand. The share of retail sales accounted for by the two leading discount food stores, Aldi and Lidl, has increased very significantly and together they now account for approximately 25% of convenience expenditure, similar to that of the leading national multiples such as Tesco, Dunnes Stores and Supervalu.

3.5.17 Expansion of discount food stores have been replicated with the comparison sector with limited growth in new retail stores being led by multiple retailers selling products at high prices, both in bulky goods and clothing and footwear sector.

Comparison Retailing

3.5.18 Since 2008 there has been a very significant reduction of development of new comparison retail facilities nationally. Very few new shopping centres have been developed, other than at neighbourhood level and activities focused mostly on re-structuring and refurbishing and upgrading existing centres.

3.5.19 Between 2008 and 2012, this is primarily due to the economic recession and since 2012 the impact of online retailing is increasingly felt, particularly in the comparison sector, curtailing expansion and growth. Nonetheless there are some significant opportunities in large urban areas which are now being brought forward to a development of new or expanded shopping centres in key locations.

3.5.20 In respect of retail warehousing, there has been extremely limited development throughout the country, resulting from an over provision of retail warehousing in the previous decade in many locations throughout the country. Provision is limited to a small number of locations in the largest urban areas.

3.6 NATIONAL & INTERNATIONAL LITERATURE REVIEW ON RETAILING

3.6.1 The retail sector is an area in which a lot of on-going research is conducted at both national and international level. A number of the large Irish accountancy firms regularly contribute to international publications on trends within the retail sector. All of these publications confirm that the retail sector in recent years has been going through a transformative period, largely driven by technological change. While the sector has seen rapid penetration of on-line shopping, the traditional 'brick & mortar' stores are proving more resilient than expected, but must be adaptive to change.

3.6.2 Set out below are the findings of a number of major surveys and reports on the retail sector published over the last 2-3 years, which provide a good overview and understanding of the changes which have been occurring in the retail sector and which are likely to continue in the years ahead.

KPMG Retail Trends 2019

3.6.3 The report notes that 2019 is poised to be a transformative year for retailing, as technology continues to change the rules of engagement, and consumers becoming more demanding than ever.

3.6.4 The report notes how consumers are becoming more price savvy – for example 81% of shoppers do on-line research before committing to purchase, and 89% begin their buying process with a search engine.

3.6.5 The report also emphasis the growing importance of Experiential Retailing or 'Retailtainment' as it starting to be known. As the desire for experiences rises – millennials said 52% of holiday spending would go to experience related purchases (compared to 39% for older consumers), the trend away from bricks and mortar shops may be reversed in the future.

3.6.6 For example 78% of millennials would choose to spend money on an experience or an event, and since 1987 the share of consumer spending on live experiences relative to total US consumer spending increased by 70%.

PWC Retail & Consumer Report 2018

3.6.7 The report identifies the following key trends for the retail sector:

- Shift to online is real and is happening at pace
- Mobile is a game changer
- Social media is emerging as the great influencer
- Security is key to building trust
- The role of the store is critical and cannot be ignored.

3.6.8 The report notes that economically all the indicators are positive, and that Irish consumers are positive about the spending outlook. However the new shopping habits developed during the economic recession have not been forgotten.

3.6.9 Some of the key findings from the PWC survey were:

- Mobile has become the standard, and is set to become the dominant platform for online shopping in coming years. Already 33% of Irish consumers more likely to shop with a retailer that offers mobile payment.
- The store continues to evolve. Physical stores remain as the most important shopping channel and will continue to hold this position of strength. The PWC survey shows that consumers like to shop in stores, and will keep doing so as long as stores provide the right experience, combination of value, convenience, personal service and integrated physical and online services.

3.6.10 The following are some key survey results highlighted in the PWC survey:

- 38% of 25-34 year olds shop online weekly
- 18% say they shop less often at other retail stores as a result of Amazon
- Less than 50% say they are satisfied with their in-store shopping experience
- 94% of 18-24 year olds use social media to inspire their purchases.
- 77% of consumers are willing to pay for same day or next day delivery.
- 60% of Irish consumers consider buying Irish products as important.
- 25% of Irish consumers are shopping online at least weekly, compared to 50% in the UK.
- 29% of consumers make purchases by mobile phone (projected to grow to 50% in next 5 years)
- Only 3% of grocery purchases made online in Ireland, compared to 7.5% in UK

3.6.11 While certain categories (Clothes/footwear books & music) have experienced an increasing shift to online, other categories have not – e.g. DIY/bulky goods with 60% of consumers stating that they never purchased such goods online.

3.6.12 While the store remains the most important shopping channel for consumers with

73% of Irish consumers shopping in store monthly or more frequently, less than half (36%) are satisfied with most elements of the in-store experience.

Retail Ireland Monitor 2018 & 2019

3.6.13 Retail Ireland publishes quarterly reports on the state of the retail sector in Ireland, and contains a useful set of metrics measuring performance across the various categories of retail. For example 2018 saw an increase supermarkets sales by 4.2% and 3.2% for household goods. Conversely departments stores saw a decline in sales of 7.9%, while sales in fashion and footwear remained static. However figures from Q1 2019 have shown an 6% increase sales in fashion/footwear, which is encouraging.

3.6.14 The quarterly reports also contain an editorial piece by the Retail Ireland Director. The following is a quote from the February 2019 Monitor editorial.

"Don't believe the hype, Irish retail remains solid. Never has there been such a focus on the trials and tribulations of the retail sector as we have seen over the last number of months. Barely a day goes by without one media outlet or another decrying the imminent 'death of retail'. We consistently hear about the emerging doom precipitated by a changing consumer and the emergence of online as the grim reaper on the Irish retail landscape. This scrutiny intensified during 2018 as our nearest neighbour hit a speed wobble, driven by an increasingly unsteady economy, a number of high-profile retail failures and a market correction, which was probably overdue. Unfortunately, the view of Irish retail has been largely coloured by the darkening mood in the UK retail sector. This is only natural given the proliferation of shared high street brands and our similar consumer culture and behaviours. It's not the full story, however. The lazy narrative is what is happening in the UK must reflect the reality of Irish retail. While this is partially correct in terms of the macro global retail trends, when you delve a little deeper a different picture emerges. Irish retail has performed admirably over recent years. Buoyed by strong economic growth and a consumer who while cautious, was primed to spend a little more, the sector has grown in value terms by between two and four per cent per annum for the last five years. Not spectacular, but steady, and when compared with our counterparts in the UK, a strong performance. This is not to say that the sector doesn't face many challenges. Towards the back end of 2018 we have seen a softening of Irish consumer sentiment and a growing sense amongst the Irish public that geopolitical events will have an impact upon their personal finances in the year ahead. We are facing a dramatic technology led shift in how retail operates. Our customer has changed and changed forever. Shopping patterns have altered, and number of store visits is falling. They are more demanding than ever and need a little more coaxing into that discretionary purchase than in years past. All of this increases the challenge for Irish retailers."

3.6.15 The May Editorial made particular reference to the growing importance of experiential shopping, with the following statement:

"Consumer behaviour continues to shift and evolve, but one pattern which has emerged in recent years is the extent to which events are now driving consumer spending patterns. It seems consumers want to be convinced to part with their hard-earned cash and view the decision to spend mainly through the prism of

experience. Does this purchase tie back to an event or occasion of interest? A sense of allowing themselves to spend that little bit more because it is a certain time of year, a special occasion is now crucial in the consumer decision making tree. It almost appears an unspoken permission to spend is now required. Creating those events or tying up with existing events will now be a crucial part of any retailers marketing plan over the coming years."

3.6.16 These quarterly reports have also captured the growth in online shopping in Ireland. For the 11 months to end of November 2018 e-commerce transactions topped €15.2 billion. However of this Retail Ireland estimate that circa 70% of online purchases leave the State. Now 50% of Irish consumers shop online compared to 19% a decade ago, with convenience being the main driver of this growth. Hence the move to smart phones for shopping online.

3.6.17 The final section examines two important reports from 2018 which were focused on e-commerce in Ireland.

E-Shopworld 2018 Report

3.6.18 This report estimates that there are now 2.89 million e-commerce users in Ireland, and by 2022 this is estimated to grow by a further 460,000 to top 3,25 million or 70% of Ireland's population. By 2022 project that the average spend per capita online will be €1,539 p.a.

3.6.19 While use of mobile phones for e-commerce is growing, in 2018 the majority (83%) of online purchases were made through a desktop computer.

3.6.20 In 2018 the level of internet penetration in Ireland stood at 85.3%, while 3.51 million people in Ireland were active on social media.

3.6.21 Almost €21 billion worth of goods were bought online from UK based companies.

Wolfgang Digital Periodical – 2018 Irish Online Economy Report

3.6.22 Britain's digital economy contributes 12.4% to country's GDP – in Ireland the equivalent figure is 6%, so considerable potential for growth.

3.6.23 In 2017 traffic on e-commerce sites in Ireland grew by 14% year on year, while number of transactions increased by 32%, suggesting that sites are converting more browsing into sales, so that revenue was up 19%.

3.6.24 In 2017 the average spend per transaction in Ireland was €147.

3.6.25 In terms of method of online shopping, as measured by revenue sales, while mobile is gaining ground (grew 20% 2016-17), the desktop is still the preferred medium. The relative figures in 2017 were:

- Desktop 58%
- Mobile 30%
- Tablet 12%

Concluding Remarks

3.6.26 What the literature review has highlighted is that while Ireland is following international trends, particularly in the adoption and growth of online shopping, it is still some years behind more mature digital economies such as the UK. Furthermore, the recent struggles experienced by bricks and mortar stores in the UK, particularly by the large department stores, are not as pronounced here in Ireland.

3.6.27 Stores continue to remain the most important shopping channel. However, retailers need to offer a compelling consumer offer in order to compete with the convenience of online shopping. The overall experience is becoming the critical factor, and this is where city and town centres have potential advantages over out of town shopping malls. Experiential retailing and sustainability are likely to be the key considerations for the younger generations of shoppers.

3.7 CONCLUSION

3.7.2 It is evident that Waterford City & County has experienced steady population growth over the last decade, and this is projected to continue, and in the case of Waterford city to significantly increase under the proposals contained in the National Planning Framework.

3.7.3 Under the Regional Spatial & Economic Strategy population projections, the population target for the Waterford City & Suburbs is 74,240, with the population projection for the Waterford Metropolitan area being 81,800 by 2031. This will be a significant increase representing a projected growth for the City area of 38.8%. The equivalent growth to 2031 for Waterford County, excluding the city is 19.6%.

3.7.4 This growth in population will have significant implications for Waterford City & County. It will be necessary to plan for this projected increase and to ensure that there are sufficient services to meet the needs of the growing population. This will consequently have an impact on the provision of retail services. A key factor in this will be consolidating services in Waterford City and the towns of Dungarvan & Tramore whilst also providing for appropriate rural development, diversification and special niche markets in smaller towns and rural areas, such as retailing linked to agri-food industry and the tourism sector. This is in accordance with the principles of sustainable development which seeks to direct services and facilities to key urban centres, whilst still supporting the rural areas.

3.7.5 This chapter has also shown an above average dependency on manufacturing employment. There is a need to provide a diversification of employment sectors to seek to provide a balance in this regard and avoid an over reliance on these sectors. More pertinently, there is a need for employment opportunities in general, with the south-east region having the highest rate of unemployment in the country as of June 2019 when the South East region recorded an unemployment rate of 8.1% against a State average of 4.8%. There is a need to address this deficit to ensure that there is not a significant out migration of the population to other competing counties. The retail sector, if developed, has the potential to create significant employment.

3.7.6 In terms of retail trends, the retail market has continued to diversify to meet new and evolving demands, demonstrated by, for example, the linking of retail and leisure facilities, larger floor plates and extended opening hours, and the ever increasing importance on on-line shopping. Such evolution and diversification will need to continue into the future to combat increased competition from international retailers in both the comparison and convenience markets, and to ensure that the city & town centres in Waterford can compete successfully with other urban centres in the region.

3.7.7 The recent trends in retailing should be taken into account in the formulation of a strategy to achieve this. Opportunities for larger scale convenience and comparison stores in appropriate locations and comparison outlets linked with social and leisure activities should be encouraged in order to attract occupiers. At the same time, care will need to be taken to ensure that the city and town centres retains dominance in terms of retailing, particularly against the potential threat of retail parks competing directly with city/town centre in terms of products and goods on sale.

CHAPTER 4

Survey Approach and Analysis

4.1 INTRODUCTION

4.1.1 In order to establish the necessary data for the retail study, it was necessary to undertake a number of qualitative and quantitative surveys. These included:

- Review and Updated Floor Space Survey
- Household Survey
- Shoppers Survey

4.1.2 A brief description of each of the surveys carried out and the methodology utilised is described below.

4.2 FLOOR SPACE SURVEY

4.2.1 A detailed floorspace survey for Waterford City & County was included in the 2009 Waterford City Report undertaken by Waterford City Council. This report included detailed floorspace information for the City area.

4.2.2 In connection with the preparation of a new City & County Retail Strategy, Waterford Council issued on the 30th September a set of tables updating the existing and permitted retail floorspace figures for Waterford City, Dungarvan and Tramore for 2019

4.2.3 The main findings of the survey work are summarised in Table 4.1 below, and in the following text.

Table 4.1 Retail Floorspace in Waterford City
Source: Waterford City & County Council

Waterford City (including amalgamation of Waterford City and County area) Name of Study	Retail Vacancy	Convenience	Comparison	Bulky Vacancy	Bulky Comparison	
Retail Strategy 2012 (existing)		31,675	39,252		41,444	112,371
WCCC Review 2019 (existing)	11,728	34,624	38,480	1,749	55,993	147,956
Pipeline Projects						
North Quay SDZ Planning Scheme			30,000[1]			
Michael Street Permitted		2,885	6,731			

Notes to Table:

Retail Vacancy: Section 5.7 of the Waterford City Retail Strategy (2012) states that the rate of vacancy was estimated to be approximately 8.5% based on the 2009 City Centre Report. However, no figure for the quantum of sq. m. of vacant floor space was given in the report. The 2019 survey identified a total of 18,878 sq. m. (14.6%) of vacant floor space. However, if Bulky Comparison is removed from this equation the figure increase to 16%.

Convenience: The increase of 2,949 sq. m. convenience floor space in the 2019 survey is due to the opening of a new Adli store in Ardkeen (1,450 sq. m.) and the opening of various new ethnic food shops across Waterford city.

Comparison: The decrease of 772 sq. m Comparison floor space in the 2019 survey is partly due to the fact that shops selling electrical and household goods within the city centre in the 2019 survey were re-classed as 'bulky comparison'.

Bulky Comparison: The increase of 14,549 sq. m Bulky Comparison floorspace as identified in the 2019 WCCC survey can be explained by the former 'Butlerstown Retail Park' now 'Waterford Retail Park' being reclassified from Waterford County Council's functional area to Waterford City as part of merger of the two local authorities on 1st June 2014.

North Quays SDZ: 30,000 sq.m. of retail floorspace will be provided within the Waterford North Quays SDZ Planning Scheme area under permitted application

1 **North Quays SDZ**: 30,000 sq.m. of retail floorspace will be provided within the Waterford North Quays SDZ Planning Scheme area under permitted application Reg. Ref.: 19/928.

Reg. Ref.: 19/928.

Michael Street: This total figure of 9,616 sq. m. of retail floorspace is what was permitted under the extant planning permission. However as no construction has occurred to date, this figure may be subject of further change.

Table 4.2 Retail Floorspace in Dungarvan

Dungarvan Town Name of Study	Retail Vacancy	Convenience	Comparison	Bulky Vacancy	Bulky Comparison	Total
DTZ Pieda Consulting 2005	3,208	6,417	10,370		5,641	25,636
WCC Review 2019	2,607	10,092	10,686	3,922	17,634	44,941
Difference	-601	3,675[7]	316	3,922	11,993[8]	19,305

Source: Waterford City & County Council

Notes to Table:
Convenience: The additional 3,675 sq. m. is due to the fact that since the 2005 DTZ survey Adli and Lidl have been constructed together with a number of small food shops and ethnic food shops across the town.

Bulky Comparison: The additional 11,993 sq. m. is due to the development of a number of retail warehouses in the Shandon and Dungarvan Business Parks and adjoining the Kilrush roundabout.

Table 4.3: Retail Floorspace in Tramore

Tramore Town Name of Study	Retail Vacancy	Convenience	Comparison	Bulky Vacancy	Bulky Comparison	Total
DTZ Pieda Consulting 2005	110	3,000	2,620			5,730
WCC Review 2019	446	10,108	2,235	650	2,202	19,509
Difference	336	7,108[9]	-385	650[10]	2,202	13,779

Source: Waterford City & County Council

Notes to Table:
Convenience: The additional 7,108 sq. m. is due to new developments since the 2005 DTZ survey such as Tesco, Lidl, and most recently Aldi in December 2019, as well as a small number of small food shops in the town.

The 2005 DTZ survey did not account for Bulky Comparison/Bulky Vacancy.

4.2.4 In addition there is a further c. 4,200 sq. m. of convenience floorspace and c. 2,400 comparison floorspace within the smaller towns and villages in county Waterford in 2019.

4.2.5 The following section sets out the main changes in floorspace which have occurred since the previous surveys in 2011 in City and 2005 in County.

4.3 WATERFORD CITY

Convenience

4.3.1 Between 2012 and 2019 Waterford City has seen only a modest increase in convenience floorspace of c. 2,950 sq. m., an increase of 9.3% over a seven year period. Roughly half of this was accounted for by the new Aldi Ardkeen store with the balance made up by new smaller independent stores throughout the city.

4.3.2 In terms of pipeline, the only significant development with planning permission is the Michael Street/New Street Shopping Centre which contains c. 2,885 sq. m. of convenience floorspace.

Comparison

4.3.3 Between 2012 and 2019 the amount of comparison floorspace in the city actually contracted with a reduction of c. 700 sq. m. in floorspace. While this reduction can partly be attributed to a reclassification of shops selling electrical/household goods as bulky comparison, it does clearly demonstrate how stagnant the comparison retail sector has been in the city over the last decade.

4.3.4 However, this is in line with trends nationally, which have seen very limited new comparison retail developments in Ireland in recent years

4.3.5 Again, in terms of pipeline, the only significant permitted development is the proposed Michael Street Centre, which contains c. 6,730 sq. m. of comparison sales space.

Bulky Comparison

4.3.6 Between 2012 and 2019, other than the reclassification of the Butlerstown Retail Park, an additional c. 2,560 sq. m. of bulky comparison floorspace was added to the city's stock. This is reflective of the fact that the main growth in retail warehousing occurred prior to the publication of the Retail Guidelines in 2012, with relatively modest increases since then.

4.3.7 In terms of pipeline there are no major planned developments with existing planning permissions. However, there is c.1,750 sq. m. of bulky comparison floorspace currently vacant in a number of business parks around the city.

Vacancy Levels

4.3.8 Based on WCCC 2019 survey figures, the total retail vacancy rate in the city is currently 14.6%. However, when you strip out the bulky comparison vacant floorspace the retail vacancy rate increases to 16.0%. However, as this figure is the vacancy rate for the entire city and suburbs, it is not directly comparable with the 2012 vacancy figure of 8.5%, which was solely for the city centre. Overall approximately 11,700 sq. m. of convenience & comparison floorspace is currently vacant within the city and suburbs.

4.3.9 This current vacancy rate estimate of 16% is consistent with the Q2 2019 GEOVIEW Commercial Vacancy Rates Report[2] which found that Waterford city had an overall commercial vacancy rate of 17.1%.

4.4 DUNGARVAN

Convenience

4.4.1 Between 2005 and 2019 the extent of convenience floorspace in the town has increased by 3,675 sq. m.. Of this c. 2695 sq. m. is accounted by the opening of a Lidl and an Aldi store in the town. The balance of 980 sq. m. is made up of new small independent shops opening.

Comparison

4.4.2 Over the 14 years 2005-2019 there has only been a very modest increase in the amount of comparison floorspace in the town of in the order of just over 300 sq. m.

Bulky Comparison

4.4.3 This is the retail category which has shown the biggest growth in Dungarvan over the last decade. Since 2005 almost an additional 12,000 sq. m. of floorspace has been added in this category, mainly in business parks such as Shandon, Applegate, and Dungarvan parks

Vacancy Levels

4.4.4 Overall Dungarvan has a vacancy rate of 14.5%. However, when you strip out the bulky company figure the retail vacancy rate drops to 12.5%.

4.4.5 The commercial vacancy rate as published by GeoDirectory in July was 13.6%

4.5 TRAMORE

Convenience

4.5.1 Tramore has seen a very significant increase in the amount of convenience floorspace in the town. Since 2005 the amount of additional convenience floorspace has increased by over 7,100 sq. m. This is primarily accounted for by the opening of new Tesco and Lidl supermarkets and a new Aldi supermarket which opened in December 2019. A further c. 500 sq. m. has been added by a new Applegreen station and some small food shops.

Comparison

4.5.2 Tramore's comparison offering which has always been very modest, recorded a decline in floorspace in the order of 385 sq. m. over the period 2005-2019.

Bulky Comparison

[2] Source GeoDirectory Database @ 12/7/2019

4.5.3 This category of retailing was not included in 2005. However, by 2019 there is now c. 2,200 sq. m. of bulky comparison floorspace.

Vacancy Levels

4.5.4 Tramore has an overall vacancy rate of 5.6%. However, when you omit the bulky comparison floorspace, the retail vacancy rate drops to 3.6%.

4.6 COMPARISON WITH CORK

4.6.1 To give context to these figures it is useful to compare existing retail floorspace provision in Waterford with other cities in Ireland. In this regard we have comparable figures for the Cork Metropolitan Area from a 2013 study. Some of the notable differences between Cork & Waterford include:

- In Cork the comparison floorspace accounts for 45.5% of all retail floorspace, while in Waterford the equivalent figure is only 28.5%.
- Conversely in relation to bulky goods floorspace, the Cork percentage figure is 27% whereas in Waterford the figure is 52%
- When expressing the figures as sq.m. floorspace per capita, this again shows how the comparison sector in Waterford is under-developed compared with Cork. Thus, in Cork there is 0.63 sq.m. comparison floorspace per capita, whereas in Waterford the figure is 0.46.

4.6.1 What these comparator figures illustrate is the fact that the existing comparison shopping provision in Waterford County, particularly within the city, is relatively under provided for, relative to both Waterford's population and convenience and bulky goods markets.

4.7 HOUSEHOLD SURVEY

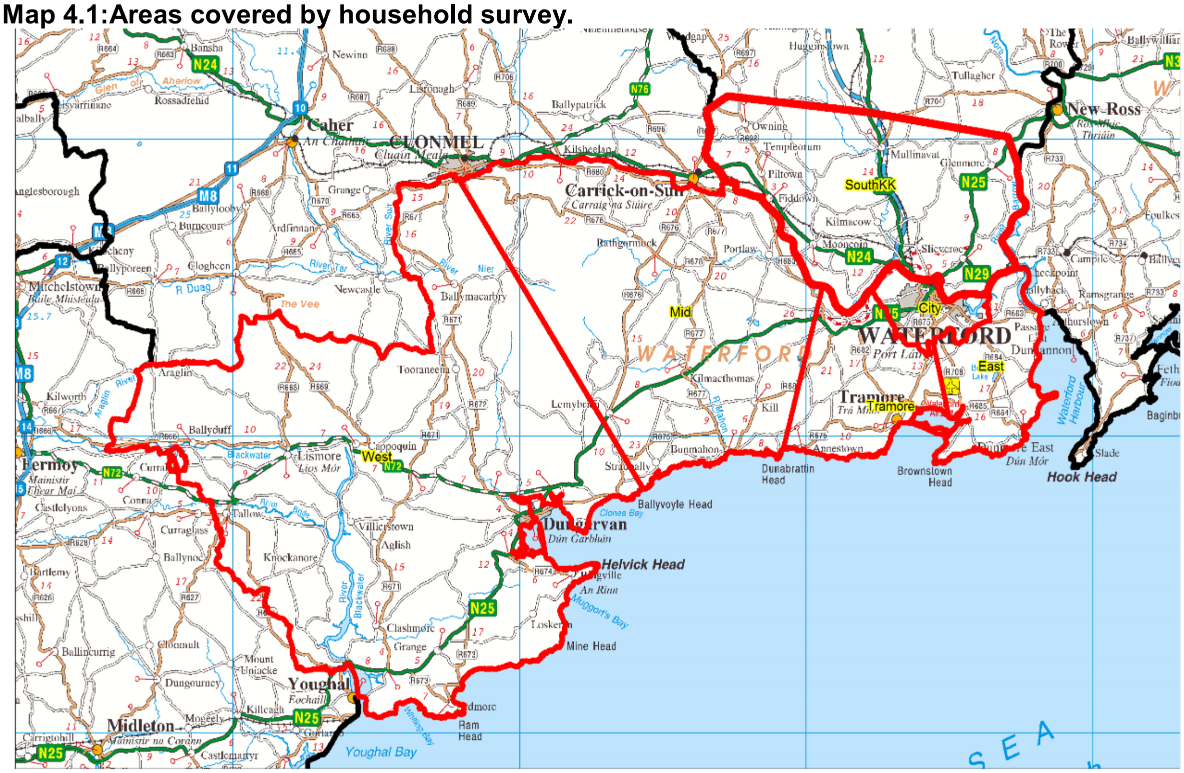
4.7.1 The household survey is an essential survey in order to establish the existing shopping patterns in Waterford City and County for different retailing types including clothing, footwear, food and household goods.

4.7.2 During the month of September 2019 a telephone survey of 500 No. respondents was carried out by Demographics Ireland in connection with the preparation of a new City & County Retail Strategy. This is considered to be a representative sample and is comparable to household surveys conducted for other county retail strategies.

4.7.3 The respondents were broken down by geography (see Map 4.1) as follows:

	Number	Percentage
- Waterford City:	200	40%
- Tramore:	50	10%
- Rest of East Waterford:	25	5%
- Mid Waterford:	50	10%
- West Waterford (incl. Dungarvan):	100	20%
- South Kilkenny:	75	15%

Map 4.1:Areas covered by household survey.



Demographics Ireland 2019

4.7.4 The findings of the survey have been grouped under the following six headings – Food/Grocery, Clothing/Footwear, Furniture, Electrical Goods, Other Centres outside Waterford, and Satisfaction Levels with Shopping in Waterford.

Food & Grocery

- 79% of respondents do a regular main shop
- Of these 62% do main shop once a week

- Food/Grocery shopping is generally done relatively locally
- Tesco, Ardkeen and Dunnes, Dungarvan recorded highest percentage in City and Dungarvan respectfully.
- Top-up shopping done very locally, with 69% of respondents doing it at least twice a week.
- Only 3% of respondents shop on-line for groceries.[3]
- Very little leakage out of County, and where it does occur it is primarily for top-up shopping by respondents who either live outside or on the edge of the county (mainly to New Ross, Carrick & Youghal)

4.7.5 The following Table 4.4 summarises the main locations where the respondents do their main grocery shopping. Although not as prominent a feature as in previous studies, 79% of respondents do a regular major shop, with 62% of respondents doing a major grocery shop once a week and a further 10% do such a shop even more frequently. In terms of where people shop, 98% of all respondents who do a major shop, shop within Waterford city and county. Of note is the fact that all of the major grocery shopping is done with Dunnes, Supervalu and Tesco supermarkets, and not in any of the discount stores.

Table 4.4 Location of where respondents do main grocery shopping

Shop	Location	Count	%
Dunnes Stores, City Square Waterford	Waterford City	17	3%
Tesco, Poleberry	Waterford City	6	1%
Tesco, Ardkeen	Waterford City	47	9%
Supervalu, Tramore Road, Waterford	Waterford City	30	6%
Supervalu, Hypermarket, Waterford	Waterford City	32	6%
Supervalu, Dungarvan	Dungarvan	23	5%
Dunnes Stores, Dungarvan	Dungarvan	42	8%
Tesco, Lisduggan	Tramore Area, County Waterford	19	4%
Tesco, Tramore	Tramore	14	3%
Supervalu, Cappoquin	West Area, County Waterford	5	1%
Supervalu, Tramore	Tramore	18	4%
Tesco, New Ross	Wexford	4	1%
Total		257	

4.7.6 In relation to respondents living in Co. Kilkenny, 94% of do their main grocery shopping in Waterford city, with the two Supervalu supermarkets plus the City Square Dunnes being the main shops visited. For top-up shopping, which is done much more locally, the equivalent figure is 48%.

4.7.7 In relation to top-up grocery shopping, 69% of the respondents reported at they do top-up shopping for food and groceries at least twice a week, and this shopping is

[3] It is likely that since the introduction of Covid-19 restrictions in March 2020, this level of on-line grocery sales will have increased.

undertaken very local to where they live, as is evidenced for Table 4.5 below.

Table 4.5 Location of Top-up Shopping

Location	District	County	Number	%
Abbeyside	Dungarvan	Waterford	15	3%
Dungarvan	Dungarvan	Waterford	42	8%
Kilrush	Dungarvan	Waterford	1	0%
Dunmore	East Area, County Waterford	Waterford	5	1%
The Glen	East Area, County Waterford	Waterford	3	1%
Kilmacthomas	Mid Area, County Waterford	Waterford	5	1%
Kilmeaden	Tramore	Waterford	4	1%
Tramore	Tramore	Waterford	46	9%
Ardkeen	Waterford City	Waterford	60	12%
Ballybeg	Waterford City	Waterford	8	2%
Ballytruckle	Waterford City	Waterford	1	0%
City Square	Waterford City	Waterford	4	1%
Ferrybank	Waterford City	Waterford	11	2%
Hypermarket	Waterford City	Waterford	16	3%
Kilbarry	Waterford City	Waterford	5	1%
Lisduggan	Waterford City	Waterford	21	4%
Lismore Park	Waterford City	Waterford	3	1%
Morgan Street	Waterford City	Wat	3	1%
Poleberry	Waterford City	Waterford	9	2%
St John's Waterford	Waterford City	Waterford	3	1%
Tramore Road	Waterford City	Waterford	9	2%
Waterford	Waterford City	Waterford	23	5%
Aglish	West Co Waterford	Waterford	2	0%
Cappoquin	West Co Waterford	Waterford	4	1%
Clashmore	West Co Waterford	Waterford	2	0%
Lismore	West Co Waterford	Waterford	9	2%
Tallow	West Co Waterford	Waterford	6	1%
Total Waterford			320	90%
Youghal	Cork	Cork	2	1%
Piltown	County Kilkenny	Kilkenny	3	1%
Kilkenny	Kilkenny	Kilkenny	4	1%
Kilmacow	Kilkenny	Kilkenny	4	1%
Mooncoin	Kilkenny	Kilkenny	4	1%
Mullinvat	Kilkenny	Kilkenny	9	2%
Carrick-on-Suir	Tipperary	Tipperary	4	1%
Clonmel	Tipperary	Tipperary	1	1%

New Ross	Wexford	Wexford	2	1%
Total outside Waterford			33	10%

Clothing & Footwear

4.7.8 Of those respondents who shop for clothes and footwear in shops in Ireland, 89% of respondents shop in Waterford city and county. Of these 86% shop within Waterford city centre, with the balance (14%) shopping in Dungarvan. 11% of respondents shop outside of Waterford county, with Cork being the preferred location (52%), followed by Dublin (22%) and Kilkenny (14%).

4.7.9 In relation to respondents living in Co. Kilkenny, 93% do their clothes and footwear shopping in Waterford city.

- 89% of respondents shop in Waterford City & County, of which 86% shop in city and a further 14% in Dungarvan for Clothing & Footwear.
- 11% shop outside county, mainly to:
- Cork 52%
- Dublin 22%
- Kilkenny 14%
- Kildare Village 8%
-
- Of those who do shop in Cork, 80% live in West Waterford, while 75% of those who shop in Kilkenny live in South Kilkenny.
- Dublin shoppers are drawn from across the County
- Two-thirds (67%) of shoppers for Clothing/Footwear, shop between once a month to once every six months
- 25% of respondents used on-line shopping for clothes/footwear in last two months

4.7.10 This level of leakage at 11% is relatively high. For example, the equivalent figure for the Cork Metropolitan area is a comparison leakage of just 2%. However, it should be noted that this figure only captures the percentage of shoppers who travel outside the city/county to shop. The actual spend by Waterford consumers when they shop for comparison goods outside the county is likely to be a higher percentage.

4.7.11 Anecdotally, unpublished data from credit card transactions would suggest that the level of comparison retail expenditure by Waterford consumers taking place outside the county may actually be a much higher percentage when measured by retail spend.

4.7.12 However, there are clear indications that there is a significant level of leakage that the City and County are losing. This has had the effect of supressing the demand for higher order comparison in Waterford, which is reflected in the lack of growth of additional comparison floorspace in city between 2012 and 2019.

4.7.13 Arising from this leakage it is evident that Waterford is currently not fulfilling its potential as the major retail centre for the south east region. However, this situation can be turned around and there is a significant opportunity to 'close the gap' as highlighted by the unmet capacity in City Centre and especially in relation to high order comparison retailing. This will be demonstrated further in chapter 6 when the city & county's future comparison floorspace needs are quantified.

4.7.14 Tourism is another sector which can help to grow the retail demand in both the city and county. Figures taken from the recent Rikon Report[4] suggest that given the significant tourist assets and increased connectivity, there is an opportunity for Waterford City and County to continue to see double-digit growth. This report notes that Waterford City and County current annual tourism spend of €127m is expected to more than double by 2025, reaching €275m and rising to €429m by 2040. In essence, tourism spend is expected to rise by 11% per annum until 2025, driven by an 8% growth in tourist numbers and by a 2.8% annual rise in average tourism spend per visitor over the 2018-2025 period[5].

4.7.15 A breakdown of tourism expenditure to determine amount spent on retail sales is not available. Furthermore, expenditure by tourists to the city and county are not captured in the expenditure figures used in the quantitative analysis in Chapter 6, as per the Retail Guidelines, but would be regarded as an additional source to stimulate retail demand, particularly in areas of high tourism interest to be found in both the city and county in Waterford.

Furniture

4.7.16 92% of all respondents who shop for furniture shop within Waterford city and county. Of these respondents 80% shop for furniture in the city with the balance in Dungarvan and other smaller towns. Harvey Norman and Easy Living account for 50% of shopping trips for furniture. Of those respondents who shop outside the county, Cork is the most dominant location (36%), followed by Clonmel (21%).

4.7.17 In relation to respondents living in Co. Kilkenny, 85% do their shopping for furniture in Waterford city

- 73% shop in Waterford City
- 18% shop in Dungarvan
- 8% shop outside county, of which Cork accounts for a third.
- 18% of respondents did not state where shopped/did not shop
- Less than 1% shop online for Furniture

Electrical Goods

4.7.18 18% of respondents either don't shop for electrical goods in stores or did not reply. Of those respondents which do shop in stores, 96% of respondents shop in stores within Waterford city & county, with 75% shopping within the city. Of the 4% which shop outside Waterford for electrical goods, Cork accounts for one third of trips.

[4] Waterford 2040 Regional City of Scale: Strategic Investment to 2040, Rikon, March 2020.

[5] All of the projections on tourism numbers and tourism spend were compiled prior to the outbreak of the Covid-19 pandemic in Ireland. It is likely they will need to be revisited in light of the major disruption to the tourism sector brought about by the pandemic.

4.7.19 In relation to respondents living in Co. Kilkenny, 87% do their shopping for electrical goods in Waterford city.

- 60% shop in Waterford City
- 18% shop in Dungarvan
- 4% shop outside County, with Cork again being the most prominent
- 18% of respondents did not declare.
- Less than 1% shop on-line for electrical goods.
- Around half of all purchases for electrical goods made in Kelly & Dollard, Harvey Norman & Shaws.

Other Centres Outside of County

- Two thirds of respondents have visited another city/town/shopping centre outside of County Waterford for shopping in last six months.
- Of this Cork accounted for 33%, followed by Dublin 26%, Kilkenny 24% & Kildare Village 13%.
- However the frequency to these centres is quite low (mainly once or twice in last 6 months).
- The main reasons given for shopping there were: Greater choice, combine with other purpose, and meet friends/relatives

Satisfaction Levels with Shopping in County

- Grocery/food: 91% satisfaction rating, with main issues being range, price & car parking
- Clothes/Footwear: Only 61% satisfied, with 28% dis-satisfied. Main issues are lack of range/choice, and to lesser extent parking.
- Bulky Household Goods: 84% satisfied, with main issues, range, cost & parking
- 41% of respondents combine shopping with other activities when visit city/town
- The main other attractors are:
- Food/Beverages: 62%
- Experience/Meet Friends: 19%
- Non retail activities: 11%
- Sports & Leisure: 4%

General Conclusions

4.7.20 The results of the household survey are significant in determining the levels of outflows and inflows of convenience, comparison and bulky goods expenditure from/to the administrative area of Waterford City & County.

4.7.21 Approximately 92% of comparison goods (average between clothing & footwear, furniture and electrical goods) expenditure in Waterford City & County is retained within the administrative boundary of the combined Council and this figure rises to circa 94% for convenience shopping (average between main grocery shop & top-up shopping). These figures are comparable with the last surveys conducted in 2011, and are reflective of the fact that there has been relatively little change to the retail landscape within the city and county, or within competing centres in the wider hinterland. The household survey also found that 94% of respondents living within the 0-30 minute isochrone in Co. Kilkenny do their grocery shopping in

Waterford, while the equivalent figure for comparison shopping is 88%.

4.7.22 The survey results also demonstrate a high level of satisfaction with the existing convenience and bulky goods floorspace within the City & County, but lower levels for comparison shopping.

4.8 SHOPPER'S SURVEY

4.8.1 The purpose of the shopper survey is to provide a profile of the people who visit Waterford city centre, the district shopping centres of Ardkeen and Lisduggan and the towns of Dungarvan & Tramore for shopping purposes, and to obtain their views on the quality and quantum of the retail offering. The shopper's survey also helps to analyse the shopping patterns of people who visit these centres from outside the County, as well as obtaining information on the levels of spend, the reasons for visiting the centres, and their suggestions as how the centres could be improved.

Methodology

4.8.2 The shopper's survey was undertaken in the three locations in Waterford City, and in the town centres of Dungarvan and Tramore in September 2019. It was also carried out by Demographics Ireland and included a street interview with 400 respondents. The surveys were carried out at the following locations in the City Centre:

- Shaws Department Store on the Quays.
- Main Entrance to City Square Shopping Centre.
- Barronstrand Street.
- Poleberry (TK Maxx).

4.8.3 Respondents were interviewed both at the weekend and during mid-week, during the principal shopping hours. Surveys were not carried out over bank holiday weekends, as these may have distorted normal shopping patterns. This is considered to be a representative sample and is comparable to shopper surveys conducted for other county retail strategies. Such surveys provide an established method to gauge shopper preferences and trends, and as such are recognised as an essential element of standardised retail strategy methodologies. A summary of the results of the survey is provided below.

4.8.4 The respondents were broken down by geography as follows:

	Number
♦ Waterford City Centre:	100
♦ Ardkeen:	50
♦ Lisduggan:	50
♦ Durgarvan:	100
♦ Tramore:	100

4.8.5 The findings of the survey have been grouped under the following 9 No. headings:

- Social Class of Respondents
- Geography of Respondents
- Means of Transport
- Purpose of Visit to Centre
- Level of Spend
- Attractions of Centre
- Suggested Improvements
- Shopping Outside County and;
- On-line Shopping.

Social Class of Respondents

5 Across the five centres the social class of the respondents is broken down as follows:

6 Social Class B – 15%; C1 – 37%; C2 – 19%; D – 24%; E & lower – 5%.

7 However, there were significant variations between the different locations. In particular the social class of the Waterford city respondents was significantly lower than the county average – for instance only 4% of respondents were in Class B, whereas 50% were in Class D or lower (against County average figures of 15% and 29% respectively).

8 Conversely Ardkeen and Tramore had above average numbers in the B class and fewer in the D or lower class.

9 Assuming the sample respondents are representative of the wider shopper population to an area, these socio-economic differences in profile have a significant bearing on shopping behaviour and levels of spend.

Geography of Respondents

- The vast majority of respondents (79%) in Waterford city centre, Lidduggan, and Tramore were residents of the respective areas.
- The exceptions were Ardkeen and Dungarvan where a third or more of the respondents travelled from outside the area to visit the centre. In the case of Ardkeen this was mainly from other towns/villages in east of county, while for Dungarvan it was from towns in West Waterford. On average 6% of shoppers surveyed in Waterford city came from outside Waterford county, while all shopper respondents in both Dungarvan & Tramore came from within Waterford county.

Means of Transport

- The vast majority (75% +) of respondents to both towns and the two district/suburban centres travelled to the centre by car. The balance was mainly travel on foot.
- Only in the city centre was the transport modal split more balanced. Here less than half (47%) travelled by car, with 36% walking and a further 14% by bus.

Purpose of Visit to Centre

- For the two towns and district/suburban centres the principal reason given for vising the centre was to undertake either the main or top-up grocery shopping. As a percentage this ranged from 75% for Dungarvan to practically 100% for Tramore.
- The equivalent figure for Waterford city centre was much lower at 47%, reflecting the more diverse range and functions of the city.
- For the city centre the two other main reasons for visiting the city centre were shopping

for clothes and footwear and for eating out.
- Shoppers to Dungarvan also listed these two reasons but to a somewhat lower extent.
- Of the district/suburban centres, only Ardkeen had more than a third of respondents list eating out as an important factor.

Levels of Spend

- The levels of spend in each of the centres is closely linked to the purpose of the visit (main grocery shop/top-up food/comparison shopping/ non retail visit), and to the socio-economic profile of the respondents.
- Thus for instance between 40-50% of respondents to Ardkeen, Lisduggan & Tramore spent less than €30, on mainly grocery shopping.
- Conversely 41% of respondents to city centre and 56% of respondents to Dungarvan spent on average €50 - €150 on the visit, reflecting the higher levels of comparison shopping.
- The higher numbers of respondents who travelled by bus or on foot to city centre could also affect the spend profile.

Attractions of Centre

- For Waterford city centre the main attractions for respondents were the presence of good shopping malls and pedestrianised streets
- For the two towns the main attractor was the overall shopping environment.
- In respect of the district/suburban centres the quality of the shopping malls topped the list of attractions.
- In terms of the retail offering the main attractions for Waterford city centre and Dungarvan was the choice of clothes/footwear shops.
- For the other three centres a good choice of places to eat & drink were the attractors scored highest.

Suggested Improvements

- Across all centres the number one improvement to the retail offering most frequently mentioned by respondents was to increase the range of shops, and particularly for the city more designer shops/boutiques.
- In terms of environmental improvements, the issues varied across the five centres. For the city centre the main issues were improved safety/security and more events.
- For Dungarvan the two principal issues were the need for more public toilets and pedestrianised streets.
- For Tramore there was no one dominant issue, although more facilities for the disabled was most frequently mentioned.
- For the two district/suburban centres the top two issues were more public toilets and improved security.
- In terms of issues around improvements to accessibility, across all five centres the number one suggested improvement was the introduction of free or cheaper car parking.
- Improved access by car was regularly referenced by shoppers to the three Waterford city centres

Shopping Outside County

- While Waterford City is by far the dominant location for shoppers across the county, a number of respondents do shop outside of the county. However, of those that do approximately two thirds shop only once every three months or less frequently.
- The main centres where respondents visit to shop outside of the county are:

- Kilkenny (20% of respondents)
- Cork (13%)
- Dublin (12%)
- Kildare Village (6%)

On-Line Shopping

- Overall the percentage of respondents who at least sometime shop on-line is 45%. However, this figure varies from a high of 54% in Ardkeen to a low of 40% in Tramore and 35% in Dungarvan.
- Of those who do shop on-line, approximately one third shop several times a month, one third shop about once a month and one third shop on-line less frequently.
- By far the main type of goods bought on-line across all locations is clothing and footwear, with electrical goods a distant second.

CHAPTER 5

Health Check Assessment

5.1 INTRODUCTION

5.1.1 This section of the report provides an overview of the retail profile and health check assessment of Waterford city centre and the town centres of Dungarvan and Tramore. In particular this section of the report assesses new major retail developments which have been permitted and developed in the City & County in the past number of years and discusses the implications of this development for the future retail role and function of the city and key towns. The vitality and viability of the City Centre as well as the principle town centres will be assessed.

5.1.2 Annex 2 of the Retail Planning Guidelines sets out the matters that should be taken into account when determining the vitality and viability of town centres. A health check assessment of Waterford City and the towns of Dungarvan & Tramore is an integral part of the retail strategy. A health check assessment essentially analyses the strengths and weaknesses of town centres and is based on a qualitative analysis of factors such as the range and quality of activities in the centre, its mix of uses, its accessibility to people living in the area and its general amenity appearance and safety.

5.1.3 The Retail Planning Guidelines provide a comprehensive checklist of information to be included in a health check assessment. It is stated in the guidelines that a healthy town centre; which is vital and viable, balances a number of qualities including:

Attractions **-** These underpin a town and comprise the range and diversity of shopping and other activities which draw in customers and visitors.

Accessibility **-** Successful centres need to be both accessible to the surrounding catchment area via a good road network and public transport facilities, and to encompass good local linkages between car parks, public transport stops and the various attractions within the centre.

Amenity **-** A healthy town centre should be a pleasant place to be in. It should be attractive in terms of environmental quality and urban design, it should be safe and have a distinctive identity and image.

Action **-** To function effectively as a viable commercial centre, things need to happen. Development and improvement projects should be implemented efficiently; there should be regular and effective cleaning and maintenance and there should be co-ordinated town centre management initiatives to promote the continued improvement of the centre.

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

5.1.5 In order to determine the vitality and viability of Waterford City Centre and the Town Centres in Dungarvan & Tramore the following indicators were utilised:

- Attractions

- Accessibility
- Environmental Quality/Amenity
- Diversity of Uses
- Multiple Representation
- Levels of Vacancy

5.1.6 Factors such as the extent of recent development, the suitability of existing floorspace and future development opportunities are also considered.

5.2 ATTRACTIONS

Waterford City Centre

5.2.1 Waterford is the fifth largest city in the state and is a major urban centre serving the south eastern region. It is a major retail centre in its own right, not only serving the county but a wider catchment area. The traditional shopping streets of the city are focussed on Barronstrand Street, Broad Street, John Roberts Square, Georges Street, John Street, Michael Street, Arundel Square and the South Quays.

5.2.2 The prime retail locations include Barronstrand Street (Image 5.1) and John Roberts Square (Image 5.2), where a number of high street retailers including Tommy Hilfiger, Clarkes, Penneys, Boots, Foot Locker, Sketchers, and Lifestyle are represented. In addition there is the City Square Shopping Centre. This facility opened in 1993. The centre which is anchored by Dunnes Stores, has been successful in attracting some multiple retailers who were not present in Waterford before. The gross floorspace of the development is 18,580 sq. metres and includes 30 units. The development is served by a car park with 450 spaces. The centre has generally had high rates of occupancy and has good customer facilities and a clean internal environment. Although the shopping centre has been extended in recent years, the appearance of the centre is now somewhat dated.

Image 5.1: Barronstrand Street looking towards Clock Tower

Image 5.2: John Robert's Square

5.2.3 Georges Court is another small enclosed Mall located off Barronstrrand Street. The centre has a somewhat dated environment, and contains a number of vacant units.

5.2.4 Other than a modest extension to the City Square Shopping Centre, whose units remain vacant, there has been very little retail development in the city centre since the last City Retail Strategy was prepared in 2012. Planning permission was granted by An Bord Pleanala for a mixed use retail development in the Michael Street/New Street area, but this development has not commenced to date. However, this site has now been acquired by an international investment & development company and there is good prospects that this site will be redeveloped in the short term which would be a significant new retail attraction for the City.

Image 5.3: Site of Proposed New Street Shopping Centre

5.2.5 John Roberts Square is a major civic attraction in its own right. It has been the focus of major environmental works and now accommodates public seating, landscaping and attractive stone sett paving. The square acts as a major focal point for people to meet and congregate in the City and accommodates functions such as food markets, kiosks and street entertainment. The square is also easily linked to the two main retail attractions in the City Centre area – City Square and

Georges Court. It is also easily accessible from the quays.

5.2.6 The City accommodates a number of restaurants and bars which are important in terms of the night time economy of the City. The area around High Street and Henrietta Street have developed as a restaurant cluster, with 7 restaurants/cafes located in this area. The Odeon cinema opened in the Railway Square area which was a welcome addition to the City, as was the reopening of the vacant Multiplex cinema on Patrick Street. There are also a number of night clubs, particularly around Parnell Street/John Street Intersection.

5.2.7 The City Centre is generally compact in nature and presents and attractive retail environment to shoppers with a broad range of tourism, cultural, retail, service and leisure activities.

5.2.8 Waterford City is the oldest city in Ireland. A walled city of Viking origins, it retains much of its medieval character together with the graceful buildings from its 18th century expansion. There are many fine examples of 18th century architecture in the City including the Chamber of Commerce building, the City Hall and the Bishop's Palace.

Image 5.4: Bishop's Palace

5.2.9 The City accommodates Reginald's Tower, one of the most important medieval monuments in Ireland. The tower is the oldest civic urban building in Ireland. Much of the City's historic walls are also still intact.

5.2.10 Waterford City is also the home of Waterford Crystal, the world-famous hand-crafted, cut glass product. The House of Waterford Crystal opened on the Mall in 2010. This is a major tourist attraction and City benefits from the tourist influx to this facility.

5.2.11 Other attractions include:

<u>Waterford Museum of Treasures</u> **–** This is made up of three separate museums – Reginald's Tower which houses the Viking museum, the Bishop's Palace which houses the Georgian museum and the Medieval Museum, which is an award

winning museum is housed in a purpose built building located in the heart of the Viking Triangle between the former Deanery and the rear of the Theatre Royal.

Image 5.5: Medieval Museum

Garter Lane Arts Centre - This arts centre is housed in a Quaker meeting house built in 1792. The centre houses a theatre where there are regular performances of theatre, film and music.

Christ Church Cathedral - considered one of the finest 18th century ecclesiastical buildings in Ireland.

Theatre Royal - this is a fine 19th Century theatre and it houses part of the City art collection (Image 5.3).

Municipal Gallery – This gallery, housed in the original Waterford Savings Bank Building in O'Connell Street, display the Council's extensive art collection.

King of the Vikings – this virtual reality experience is the first of its kind. The adventure takes place in a reconstructed Viking house and seamlessly blends cutting edge technology with ancient Viking house building techniques.

French Church – Remains of Huguenot Church which have been preserved.

Image 5.6: French Church

5.2.12 Other significant features and attractions in the City include the Cathedral of the Most Holy Trinity, Clock Tower, City Hall, Court House and the People's Park. There are also a number of important religious buildings and churches including Blackfriars, Franciscan Friary, Greyfriars St. Johns Church, St. Patrick's Church and Priory of St. Saviour. A museum at Mount Sion (Barrack Street) is dedicated to the story of Brother Edmund Ignatius Rice and the history of the Christian Brothers and Presentation Brothers.

5.2.13 In terms of cultural events, the SPRAOI festival, organised by the Spraoi Theatre Company, is a professional festival and street arts organisation held in Waterford during the August bank holiday weekend each year. It attracts crowds in the region of anywhere up to 80,000 people. The Spraoi Festival concentrates on showcasing top quality national and international street art and world music.

5.2.14 The Tall Ships Festival was first held in Waterford in 2005. The festival attracted in the region of 450,000 people to the City in what was the biggest event ever held in Waterford or the south east. Waterford hosted the start of the Tall Ships race again in 2011, which again showcased the potential of the city's Quays for recreational and amenity use.

5.2.15 The Waterford Harvest Food Festival takes place annually in September, when a number of the city centre streets are closed to traffic and extensive food stalls are installed. The festival offers visitors demonstrations, workshops and tours of local producers, numerous markets, tastings and dinners.

5.2.16 There are a number of Arts Festivals held in the City during the year, the largest and longest established being the Imagine Arts Festival in October.

5.2.17 The cultural, tourism and artistic attractions of the City are notable and have the potential to attract significant visitors and tourists to the City. For example the recently published Rikon[6] report stated that tourism spend in Waterford City & County was forecasted to double by 2025 rising to €275 million.

5.2.18 The River Suir bisects the City and is a major amenity and natural feature. The

[6] Waterford 2040 Regional City of Scale, Rikon 2020

South City Quays are a major focal point for Waterford, commercially and socially, and the face that Waterford presents to those traveling into the City from the north. However, they are somewhat cut off from the City by the former N25 which runs along the quays. It is noted however, that efforts have been made in recent years to lessen the impact of traffic on the Quays and to improve the pedestrian environment, although there is scope to significantly improve and enhance the environmental quality of the quays in the future and develop their amenity value.

5.2.19 The quays area has been the focus of a number of significant improvements over the last number of years. However, they are still dominated by large tracts of surface car parking (Images 5.6 and 5.7 overleaf). Whilst it is recognised that this parking is important in improving the accessibility of the City, it is perhaps not the optimal use of these lands. There is clear potential to enhance the linkage and connections between the car parking areas and the City Centre through improved pedestrian connections and traffic calming.

5.2.20 Many of the streets leading from the quays to the City Centre area have been the focus of very attractive high quality environmental improvements and paving works thus creating very effective linkages between the quays and the City Centre area. Nonetheless there is clearly scope for strengthening the connections and synergy between the City Quays and the City Centre. This is acknowledged in the City Centre Report 2009 which identifies that the Clock Tower has the potential to be developed as a 'gateway' and should be developed to signify the City Centre, to improve legibility and identify to visitors the commercial heart of the City.

5.2.21 A characteristic of the City is the fact that the buildings along the quays face the river rather than turning their back on it, a characteristic which is found in many Irish towns. The majority of the building stock on the quays is in good condition and there are relatively low vacancy rates. The quays accommodate a number of significant hotels including the Granville Hotel, Dooley's Hotel and the Bridge Hotel, together the with the Tower Hotel which has recently undergone extensive renovations and extensions, as well as a number of pubs and restaurants. However, the majority of retail units tend to be occupied by lower order retailers and there is certainly scope to develop the quality of retail representation in this area.

Dungarvan Town Centre

5.2.22 Dungarvan has a number of attractions which greatly contribute to the overall attractiveness of the town. These include an array of architectural, archaeological and cultural heritage, most noteably John's Castle. The town's core shopping is focused around and linked to the central square (Grattan Sq.); and a strength of the retail offer has been the success in ensuring that retail developments have been limited to within the N25 ring road.

5.2.23 Over the last number of years the town has developed a strong reputation for food and a number of festivals have built up around this. There are also a good number of high quality restaurants and bars serving the needs of both the resident population, but also the increasing number of visitors to the town, which was boosted two years ago with the opening of the Greenway linking Dungarvan to Waterford.

Image 5.7: The Quays, Dungarvan

5.2.24 The opening of the Dungarvan Shopping Centre in the town centre, greatly improved the comparison retail offering in the town, and the creation of a pedestrianised street connection from this centre to Grattan Square has helped to knit the centre into the core retail area.

5.2.25 In recent years significant upgrade works have been carried out to the public realm which has improved the attractiveness of the town centre for shoppers.

Tramore Town Centre

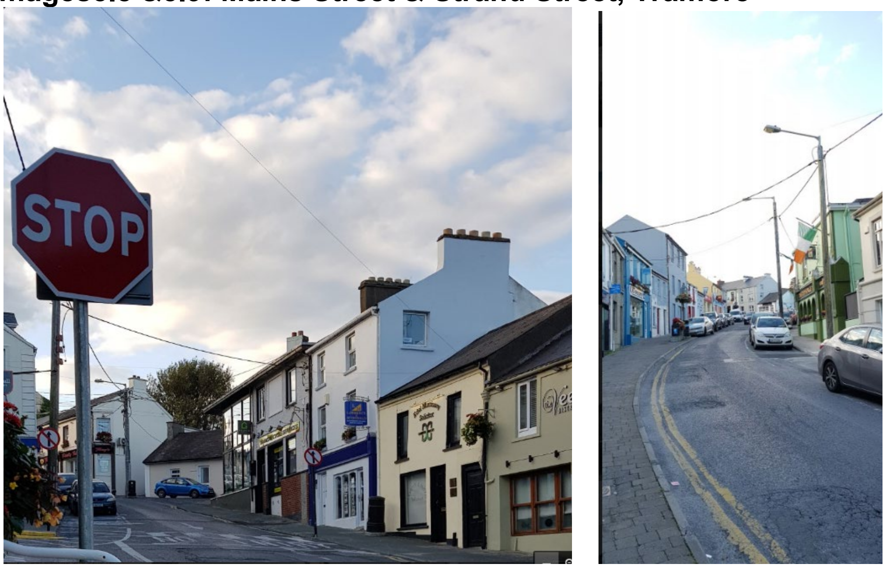
5.2.26 Tramore has a long history of being an important and popular seaside resort town, attracting large numbers of visitors to the town, mainly during the summer peak tourism season. However, over recent years great strides have been made to diversify the tourism product offering and to expand the tourism season into the shoulder months. With the growing popularity of surfing and other water sports, Tramore is developing into an all year round visitor destination.

5.2.27 This has been facilitated by the development of a number of attractions along the promenade, including the National Surf Training Centre, as well as public realm improvements to the promenade itself. The private sector has responded in turn and there are now a number of shops, cafes and restaurants along the seafront which remain open all year round.

5.2.28 While the number of comparison retail outlets in the town remains very limited, the town has significantly expanded its convenience retail offering, with the opening of Tesco and Lidl outlets in the town in recent years. With the opening of the Aldi store in the town in December 2019, Tramore is now well catered to meet the convenience shopping needs of the resident population. The town traditional high street consists of Main Street/Strand Street , which connects the lower to the upper town.

5.2.29 Significant further improvement works to the public realm are planned with assistance from funding under the URDF, which will see further improvements to the appearance of the town centre and enhanced connectivity from the main street to the promenade.

Images5.8 &5.9: Mains Street & Strand Street, Tramore



5.3 ACCESSIBILITY

Waterford City Centre

5.3.1 Waterford City centre is highly accessible to the south east region. The City is a major transportation hub with the railway station located across Rice Bridge on the north side of the city, within easy walking distance of the City Centre. Train services are provided to Dublin and Limerick.

5.3.2 Under the North Quays SDZ Planning Scheme there are proposals to relocate the existing train station and bus station to a new integrated public transport hub to be developed as part of the overall North Quays mixed development. A new pedestrian/public transport bridge is also planned as part of the North Quay proposals which would provide a direct link between this new transport hub and the city centre.

5.3.3 The City is also served by regular regional and city bus services by Bus Eireann and JJ Kavanagh/Kenneally City Services. The bus station is located on the South City Quays and thus has excellent accessibility to the City Centre.

5.3.4 Over the last number of years the road network in the greater Waterford area have improved greatly. The City is connected to Dublin, Carlow & Kilkenny by motorway (M9) and has good national primary road connections to Cork,, Dungarvan, Limerick, Clonmel, Wexford, and Rosslare Europort. In 2009 the N25 Waterford City Outer Ring Road was opened. The route consists of 23km. of high quality dual carraigeway as well as 14 km. of single carraigeway and a second crossing over the River Suir. These significant road projects have helped to reduce journey times to the city from the wider catchment area.

5.3.5 The delivery of the City By-Pass has resulted in an improved traffic environment in the City Centre, including along the South Quays. However, whilst the new road infrastructure has greatly improved accessibility to the City, it can also have the converse affect. As noted in the City Centre Report prepared by the Council in 2009, *"it is important to be conscious that motorways are a two way system, and can make Dublin and other large urban centres potentially attractive shopping destinations alternatives."*

5.3.6 The City has benefited from a programme of environmental improvements in recent years and many of the main streets and side streets have high quality paving and footpaths (Images 5.17 and 5.18). There is a high level of pedestrianisation in the city centre including the majority of Barronstrand Street and John Roberts Square, the walkway through Arundel Square, Georges Street, Michael Street and parts of John Street. Generally the pedestrian environment is of high quality and poses few difficulties to the elderly, disabled or mother with young children. There are some areas however where the pedestrian environment is somewhat poorer, for example, at the Railway Square development (TK Maxx) there are different levels and steps to negotiate which create a somewhat poor pedestrian environment, although it should be noted that this area is in private ownership.

5.3.7 The City is well served by car parking and there are over 2,600 on street and off street car parking spaces. Notwithstanding this it is noted that both the household and shoppers survey revealed that respondents would like to see improved car parking facilities. Approximately 965 car parking spaces are provided along the South City Quays. The quality of this surface car parking is variable and would benefit from enhanced hard and soft landscaping as well as a more streamlined and consistent payment system. The location of parking along the City Quays is beneficial in that it provides easily accessible parking in close proximity to the City. It is nonetheless not the optimal use of these lands which could potentially have a significant amenity function for the City. It is understood that the Council propose to investigate the feasibility of developing underground car parking instead of surface provision along the Quays.

5.3.8 The City Square Shopping Centre is served by a large 2 level basement car park with approximately 400 car parking spaces which link directly to the shopping centre by way of travelators. The centre is linked through to John Roberts Square from Arundel Square. There is a further multi storey car park at New Street. There are also a number of other smaller car parking areas including Jenkins Lane, Mayors Walk, Bolton Street, Thomas Hill, James Street, the Glen and Ballybricken. There is further on street parking at Parnell Street, The Mall and Arundel Square. A multi-storey car park is also proposed as part of the permitted in the Michael St./New Street scheme.

5.3.9 There is limited accessibility for cyclists in the City. There are few cycle lanes within the City area and limited bicycle parking provision. The Council has installed some bicycle parking provision on the quays and at John Roberts Square. However this situation is changing and will improve further when the Waterford Greenway is extended into the city centre and across the new bridge to the North Quays, from where it will connect into the planned New Ross greenway. In addition the JC Deceaux bike rental scheme is due to be rolled out in the city.

5.3.10 Further works to improve accessibility into the city centre and planned and a number of road works are under way in advance of the planned shopping centre in Michael Street/New Street, including the widening of Brown's Lane to take two way traffic.

Image 5.10: Brown's Lane road improvements

5.3.11 In conclusion, the accessibility of the City has improved dramatically over the past number of years with the completion of the M9 and City Bypass. However with the growth in traffic volumes, vehicular access to the city centre has become more difficult and congested at peak times. It will be necessary to implement further traffic management proposals to deal with these issues. Overall pedestrian accessibility to the city centre is good, with high quality paving, dished curbs and a good quality public realm. Cycling facilities in the City, while improving, need further roll-out to benefit from network effects.

Dungarvan Town Centre

5.3.12 Dungarvan is located on the N25 Cork to Waterford national primary road. It is circa 40km. from Waterford city and 75km to Cork city. To the north of the town, linked by the R672 regional road, the N72 National Secondary Road connects Dungarvan with the Kerry/Limerick region. Waterford's coastal route along the R675 Regional road links into the east of Dungarvan. While it is not located on the rail network it is well connected by frequent bus services to both Cork and Waterford. Following the opening of the N25 bypass, most of the heavy goods vehicles have been taken out of the town.

5.3.13 Dungarvan, through its successful bid in the Smarter Travel area competition, has set out its own blueprint, GoDungarvan, for the integrated and sustainable delivery of a smarter travel future for the Town. This strategy is currently being implemented and is contributing to improvement in the environment for cycling and walking in the town. Dungarvan has also greatly benefited from the development of the Waterford Greenway.

5.3.14 Dungarvan town centre is served by a number of public off street and on-street car parking facilities as well as private car park operated in conjunction with the Dungarvan shopping centre. This latter car park is well connected by pedestrian walkways to the town centre.

5.3.15 While Grattan Square has undergone a series of public realm improvements over recent years, it is still over dominated by the private car, although initiatives associated with assisting local businesses during Covid-19, has also seen a revitalisation and animation of the square, with café-style seating outside local pubs and restaurants, which has been well received.

Images 5.11 & 5.12 : Grattan Square

Tramore Town Centre

5.3.16 Tramore is located only 13 km from Waterford on the R675, which has seen significant improvements over the last decade. Accessibility to Tramore also was enhanced with the completion of the Outer Ring Road around the south of the city. The is a regular bus service between Tramore and Waterford city.

5.3.17 There is ample car parking provided along the promenade and additional parking has been developed in recent years at the entrance to the back strand. There is limited parking along the main shopping streets leading to the upper town, although the new Tesco, Aldi & Lidl stores have plenty of surface car parking. Planned public realm works will also increase the number of parking spaces within he town centre.

5.4 ENVIRONMENTAL QUALITY / AMENITY

Waterford City Centre

5.4.1 Waterford City has an attractive streetscape with many fine institutional, civic and religious buildings. The majority of buildings including the upper floors are well maintained. Nonetheless there are examples on some of the principle shopping streets of derelict, vacant or poorly maintained buildings which have a negative impact on the visual amenities of the City.

Image 5.13: Cathedral Square

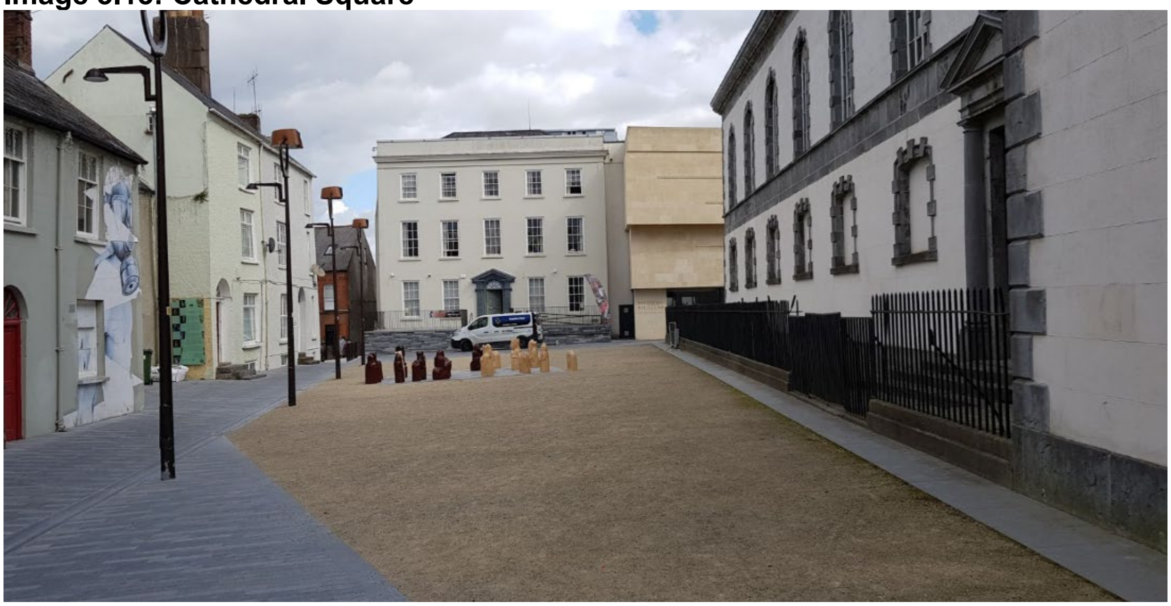


Image 5.14: Broad Street

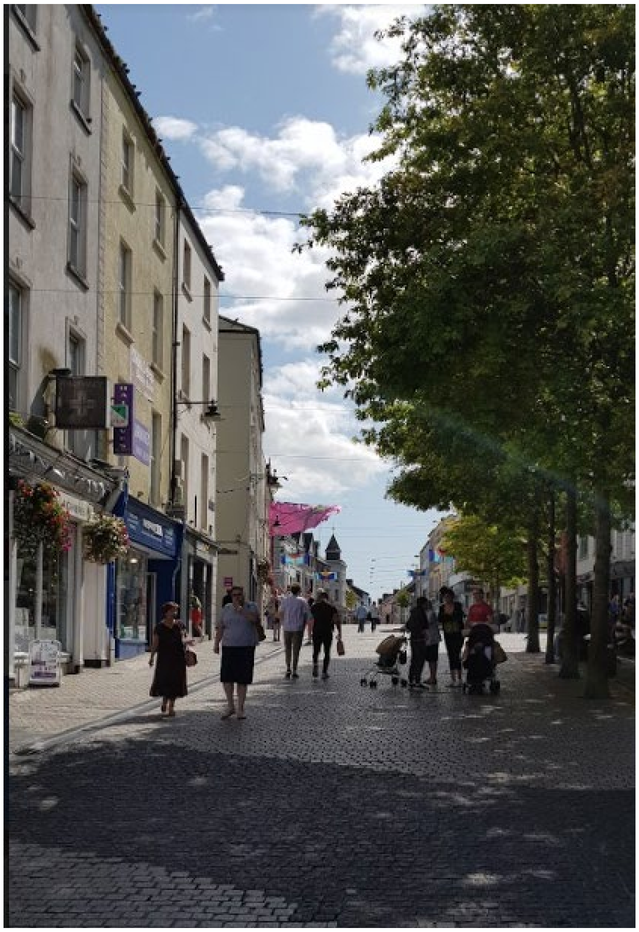


Image 5.15: Henrietta Street

5.4.2 There are also a number of underutilised and poorly maintained back-land areas that have significant potential for redevelopment.

5.4.3 The principle streets are characterised by narrow plots and buildings, many with Georgian features, of three to four stories. The majority of shop fronts are well presented and some traditional fascia have been preserved. Modern shop fronts are generally respectful of the traditional idiom. There are nonetheless some examples of poor shop front design on the principle streets.

5.4.4 The quality of paving throughout the city is generally of high quality. John Roberts Square has an attractive public seating area. It is a distinctive public space identifying the square as the heart of the city centre. Although constructed over 10 years ago, these environmental works have stood the test of time and have been well maintained.

5.4.5 Nonetheless, there are parts of the City, where paving quality is beginning to decline and would benefit from further upgrades. There are also parts of the City, particularly some of the more peripheral streets and laneways that would benefit from environmental improvement works. The shoppers survey (see chapter 4) also revealed that a significant proportion of respondents (18%) would like to see further improvements to the streetscape.

5.4.6 Litter bins are provided through the city area. Litter management at the time of the survey was reasonably good, and Waterford city has performed well in recent years in IBAL litter surveys. Public lighting appears to be adequate and unattractive wirescape minimised

5.4.7 The environmental quality of some of the more peripheral streets, particularly O' Connell Street declines as one moves away from the prime commercial area. Some of the buildings in these areas have a poor visual appearance and are in need of upgrading. The City however has benefited from past tax designated development with a significant commercial and residential scheme constructed around Railway Square. There have also been new developments on Patrick Street. However the success of these schemes has been varied with vacancy rates an issue in some areas.

5.4.8 The main shopping centre in the City - City Square has a good quality shopping environment with good public amenities including public toilets, telephone and seating areas. The internal environment is clean and well maintained with a good range of retail services and facilities, including a number of national and international multiples. The centre has good footfall and a high rate of activity. The centre is somewhat dated and is a typical enclosed mall. The other shopping centre – Georges Court is also of good quality, although has a less successful shopping environment internally due to the arrangement of the centre on differing levels and a lack of natural lighting. The centre is again dated and a retail model of its time. It does however, have good accessibility with the principle shopping streets and the Quays.

5.4.9 The City Quays are a major feature of Waterford. As already noted the quays are generally well maintained with high levels of occupancy. However, their proximity to the river is not maximised nor are they used to their full potential. Paving lacks uniformity on parts of the quays and the pedestrian environment and directional signage could be improved.

5.4.10 In recent years the Apple Market area, which has become the centre of nightlife in the city, has undergone extensive upgrading works, including the innovative roofing over of much of the public street. This has created a high quality attractive area for cafes and bars to extend their seating and tables out onto the street.

Image 5.16: The Apple Market

5.4.11 In conclusion the general quality and environmental amenity of the City Centre is good, but there are clearly some areas that need to be addressed, particularly litter management, street cleaning and maintenance. Ongoing improvements to the public realm will be essential to maintain the attractiveness of the City Centre.

Dungarvan Town Centre

5.4.12 Dungarvan has a unique and varied built heritage spanning many centuries. This heritage is a physical reminder of the culture, ideals and history of previous generations. Landmark buildings in the town include the Castle, Abbeyside, St Mary's Churches and public buildings such as the Court House. However, structures such as the quays, the terraces of 19th century houses, the layout of the town square, the vistas, the 19th century ironwork and individual buildings such as the converted warehouses also contribute significantly to the special character of the Town.

5.4.13 Generally the physical environment of the town centre is very good and a number of public realm improvement schemes have been completed in recent years. In particular the works to the quays have made this area of the town very attractive to visitors to the town.

Tramore Town Centre

5.4.14 Tramore has a very attractive natural environment with a high quality beach and seafront which has attracted visitors to the town for centuries. This natural asset has been protected and enhanced by works undertaken by Waterford Council over the years. Significant public realm improvement works have also been undertaken to the promenade.

5.4.15 The links between the promenade and the upper town and the quality of the pedestrian environment on Strand St./Main Street is in need of improvement, and this will tackled under the URDF grants scheme.

5.5 DIVERSITY OF USES

Waterford City Centre

5.5.1 Waterford City Centre accommodates a wide range of functions, retailers and retail services. A number of independent retailers such as Fitzgeralds and the Waterford Book Centre and Finders Keepers as well as a number of well known national and international multiples such as Tommy Hilfiger, Foot Locker, Clarkes, Shoe Zone, Boots, Trespass, Regatta etc. are represented on the main shopping streets. The representation of Independents is an important factor as it diversifies the retail profile of the main retail streets and differentiates the City from any typical homogenous High Street.

5.5.2 Michael Street and John Street have a different retail environment and character and are generally characterised by more specialist retailers as well as a number of butchers, specialist food shops, cafes and pubs. Michael Street in particular has a unique retail environment with a very high representation of independent food shops including Widgers Butchers, Kiely Butchers, William Greer Cake Shop and the Food Hall and Deli. It was noted that John Street had an over concentration of takeaway and fast food outlets, with 8 such outlets represented here.

5.5.3 A number of financial institutions and service providers are also represented in the City Centre. The quays primarily accommodate restaurant and hospitality services as well as a number of independent lower order convenience and comparison outlets.

5.5.4 The mix of independent, specialist retailers as well as the high street brands provides a diverse and interesting retailing environment in the City. It is noted however, that the traditional retail role of the prime retail pitch around Barronstrand Street, John Roberts Square, Broad Street and Georges Street has been coming under pressure, as lower other retail and other uses are moving into the area. Such uses in the prime retail areas can detract from the retail ambience and discourage higher order retailers from locating in the City centre.

5.5.5 The development of House of Waterford Crystal has also had spin off benefits with a number of new developments taking place in and around the Mall, including the Kite studio. It is clear however that the tourism and leisure sector could be further exploited and there is a need to further diversify and enhance the attractions of the City in order to incentivise tourists to stay longer in the City and not just to visit the House of Waterford Crystal in isolation.

5.5.6 There are three department anchor stores in the City – Debenhams[7], Dunnes Stores and Shaws. However, as noted in the City Centre Report 2009, there is a paucity of medium sized department/variety stores in the City and a number of major high street retailers are not represented including the likes of Marks and Spencer, Zara, Coast, and H & M. It is also noted that many of the high street retailers that are represented occupy a smaller floor space than they would normally. It is stated in the report:

"At the moment the general small scale size of these units suggest that these retailers are perhaps "testing the market" rather than committing whole heartedly to the city centre. Undoubtedly full commitment by such stores to Waterford i.e. occupying larger units would improve the shopping attraction."

5.5.7 The City Square shopping centre has a reasonable level of occupancy, although it has been effected by a number of recent closures since the onset of the Covid pandemic, and has a good representation of multiple retailers and comparison operators. However the smaller Georges Court centre appears to be struggling over recent years, and there are a number of vacant units.

5.5.8 Within the City centre area, convenience shopping is limited to Dunnes Stores in the City Square Centre and the Aldi store at the Glen. There is also a Tesco store at Poleberry. There are a number of smaller independent specialist food retailers and small scale convenience outlets as well as some ethnic food shops.

5.5.9 As noted there is an extant permission for a major new City Centre development in Michael Street. If progressed, this centre has the potential to significantly improve the diversity of retail offer in the City, particularly in attracting higher order comparison multiples. This is discussed further in section 5.6 below.

5.5.10 The City Centre Retail Report 2009 includes a detailed building survey of the City Centre area. This found that middle order comparison retailers dominated in the City Centre at 36% with higher order retailing constituting just 13%. As noted in the study:

"The dominance of middle order is worrying as high order comparison retailing is widely recognised as being the best placed to improve shopper attraction and increase footfall within retail centres Securing additional new high order comparison retailing formats in Waterford City Centre can address the current imbalance, improve City Centre footfall and alter the public perception of Waterford City Centre as a regional Destination Shop"

5.5.11 It is also noted in the City Centre Report that the City does not accommodate any Major Space Users which would typically have a floor space of between 1,000 and 1,999 sq. metres. In this regard, the City has failed to attract significant new retail formats like the International Chain Retailers that require larger floor plates.

5.5.12 Whilst it is noted that a number of restaurants have clustered around High Street and Henrietta Street, there is scope for the development of further food and beverage and restaurant uses particularly on the side streets connecting to the

[7] Debenhams closed during the Covid-19 restriction in March 2020

main retail spine and central square. Restaurants, cafes, and sandwich bars constituted just 8% of the floorspace in the building use survey as detailed in the City Centre Report and these types of uses have the potential to significantly enhance the vitality and viability of the City Centre, particularly in the evening.

5.5.13 The strength of independent retailer representation in the City is a positive factor as this creates a diverse and unique shopping environment. The City Centre Report noted that independent retailers account for 57% of the retail units in the study area which amount to 49% of the total net floor space of the comparison retail units which are less than 500 sq. metres. The retention of these independent operators will be an important factor in ensuring that Waterford retains its character, individuality and diversity. However, there is clearly potential to augment this with the provision of high quality comparison operators and department/variety stores to ensure that expenditure is retained within the City and not lost to other competing centres. Such additional provision would create further potential for commercial synergy and linked trips to the City Centre. Consideration may need to be given to the restriction of certain types of inappropriate uses on the principal prime pitch retail streets to maintain the primary retail role and function of these streets.

Dungarvan Town Centre

5.5.14 As Dungarvan has a relatively wide rural hinterland, the town has a more diversified retail base that many other towns of its scale. The town has a relatively limited number of national stores, but has a good variety of independent shops which have been retained in the core retail area of the town. The main shopping centre has been well integrated into the town centre, and there has been little leakage to the edge of town, other than for bulky goods.

Tramore Town Centre

5.5.15 Given the proximity to Waterford city, Tramore does not possess a developed comparison sector, but does contain a number of niche retailers linked to town's success as a seaside resort.

5.6 MULTIPLE REPRESENTATION

Waterford City Centre

5.6.1 When compared with its peer cities of Limerick and Galway, Waterford is relatively poorly represented in terms of degree of multiple representation in the City, although it does have a limited number of well known brands located on the main shopping streets. Therefore, there is clearly scope for further multiple representation.

5.6.2 As noted in section 5.5, the retailing profile of the City is dominated by middle order comparison retailers. It is detailed in the City Centre report, that this trend is in contrast to other Cities such as Cork and Limerick where higher order retailing is more pronounced. Cork in particular has been able to attract some major high street fashion names with the opening a few years ago of the Opera Lane development off Patrick Street.

5.6.3 The City Centre Report provides detailed analysis of chain store representation in the City. It is noted that in the City Centre, chain retailers account for 43% of the retail units in the study area which in turn amounts to 51% of the total net floor space of comparison retail units less than 500 sq. metres. Regional chain retail outlets account for 3% of the total net floor space of retail units less than 500 sq. metres in the city, while national chain outlets account for 14% and international chain outlets 34%. The report notes, that on first impression, the comparison retail spread seems good, however a more detailed examination reveals that ladies fashion chain retailer representation is under represented compared with other regional cities and confirms a limited representation of high order chain retailers and department/variety stores.

5.6.4 It is also noted that of the well known high street names which do exist in the City, they for the most part occupy smaller floor plates than they do in other shopping centres. They also represent only 43% of the chain fashion retailer representation spread and more typically the lower range of this sector with one or two exceptions. The shoppers and household surveys (chapter 4) also revealed respondents desire for a greater range and choice of shops and in particular more larger department stores/variety stores such as Marks and Spencer.

5.6.5 It is also noted that some high street stores are represented just as concessions. Concession stores only present a limited range of the original retailers product line and it is possible that these retailers would like to locate in stand alone stores if they were available.

5.6.6 In conclusion Waterford City has a diverse retail profile that is primarily dominated by impendent retailers, middle order comparison outlets with a limited representation of the high order multiple retailers and larger department/variety stores. This situation has not changed remarkably since the City Centre Report was undertaken.

5.6.7 As noted in the City Centre Report, the fact that many multiple retailers are not represented, is a major shortcoming that detracts from the attractiveness of the City Centre. It is detailed that as a priority Waterford City Centre needs to be in a position to offer larger floor plates to both existing and prospective retail tenants, particularly multiple retail outlets to increase the City's retail attraction to both consumers and retailers alike.

Dungarvan Town Centre

5.6.8 Dungarvan has a limited range of multiples operating out of the town, and these are limited to Irish companies, including Dunnes, Supervalu, Shaws, Easons, Elvery Sports and Carraig Donn.

Tramore Town Centre

5.6.9 Given the size of the town and its close proximity to Waterford city, Tramore does not have any multiple retailers located within the town other than the supermarket chains.

5.7 RATES OF VACANCY

Waterford City Centre

5.7.1 Within the defined core retail area of Waterford city a survey was conducted on the uses at ground floor level on the 28th August 2019. The main findings of this survey were:

- In total there were 33 No. vacant units of which, 28 No. were shops, 2 No. were former banks, and a post-office, pub and a café.
- There was a very pronounced concentration of vacant shops in the Michael Street/John Street area (12 No. vacant units) as land use function transitions from core retail to night time entertainment area.
- On the other principal shopping streets, no other street had more than two vacant units
- In addition to the above there are a number of vacant units within the Georges Court and Railway Square Shopping Centres, which are under-performing.
- The only large scale vacant shop units are newly constructed City Square units facing Arundel Square, the vacant former Debenhams department store, and the ground floor of Railway Square.
- The North Quays & the Michael St/New Street sites are subject to significant proposals.

Dungarvan Town Centre

- The core shopping area in Dungarvan is centred around Grattan Square and the
- streets which radiate out from the square, namely O'Connell Street, Parnell (Main) Street, High Street & Mary Street.
- In all there were 14 No. vacant shop units when the town was surveyed on the 4th September 2019.
- Grattan Square itself was fee of any vacancy, as was High Street and the Dungarvan Shopping Centre. The main areas where high levels of vacancy were concentrated was O'Connell Street (8 vacant shops & a vacant site) and St. Mary's Street (4 vacant shops)
- Otherwise the town shows good vitality and prosperity.

Tramore Town Centre

- Tramore does not have a clearly defined core retail area
- However, within the main spine (Main Street/Strand Street) 3 No. vacant shop units were recorded in the survey of the town on the 28th August 2019.
- The only other shopping areas in the town are centred around the Tesco/Lidl/Aldi and Supervalu supermarkets.

5.8 WATERFORD CITY & COUNTY HEALTH CHECK CONCLUSION

5.8.1 Waterford City has an attractive and vibrant city centre. The principal shopping streets have a pleasant shopping environment with good shop presentation, attractive paving and high quality public realm. John Roberts Square is an attractive civic space and is well utilised by the general public. There is a good range of independent and multiple representation in Waterford which contributes to the overall diversity and uniqueness of the retail profile of the City.

5.8.2 It is noted however, that there are parts of the City that would benefit from rejuvenation and investment. Some of the more peripheral streets are showing signs of dereliction, obsolescence and increasing rates of vacancy. There are a number of large undeveloped and underutilised back land sites that have the potential to contribute in a significant way to the strengthening of the retail core. There is also scope to significantly improve and enhance the amenity function and value of the City quays.

5.8.3 The City has many attractions, most notably its historic and religious legacy in addition to significant attractions such as the House of Waterford Crystal, located on the Mall. The City is also home to major cultural and sporting activities including the Spraoi Festival. There is clearly scope to develop the tourism role and function of the City and to diversify and enhance tourism spend through the development of complementary retail attractions and facilities. A key challenge will be to retain tourists in the City and attract them to the City Centre area. There is clearly scope to develop further specialist tourism retail orientated development within the City Core.

5.8.4 Waterford City is a major transport terminus and has excellent accessibility. As noted however, this ease of access may have the converse effect in facilitating the haemorrhaging of expenditure to other competing centres in the region. There is clearly a need to enhance and augment retail provision, diversity and choice in the City to ensure that Waterford can compete effectively with other centres such as Kilkenny, Cork and Dublin.

5.8.5 The city is well served in terms of car parking with extensive parking provision along the City Quays as well as a significant basement car park in the City Square Development. The provision of parking along the quays is clearly a benefit, however, as noted in the City Centre Report, alternatives such as underground parking in this area need to be investigated. Pedestrian accessibility is generally good within the City, although it has been identified that there is clearly scope to improve the pedestrian environment along the City Quays through the provision of enhanced hard and soft landscaping, traffic calming, improved pedestrian crossing facilities and enhanced directional signage.

5.8.6 While the public realm has seen very significant improvements in recent years, there is scope for further improvement in the City Centre area through the continued investment in the upgrade and maintenance of public pavements and the public realm. Areas such as O'Connell Street in particular have scope for improvements in the pedestrian environment through the limitation of on street car parking and enhanced hard and soft landscaping. As identified, litter management and regular and consistent street cleaning and maintenance have improved significantly and should be maintained. While some improvements have been made in recent years, cycling facilities in the City remain limited. Whilst it understood that the Council intend to invest further in the green routes, enhanced cycle paths and enhanced pedestrian routes should be a priority.

5.8.7 It is clear from the qualitative study that whilst Waterford has in general a limited array of multiple representation, the City does not have the level of such retailer representation compared to other cities such as Limerick and Cork. Waterford is underperforming in this regard and its retail profile is not commensurate with its status as a Regional City. The city lacks a number of the well known high street fashion retailers. Furthermore, some of these retailers are only represented as concession stores in the department stores and therefore have a much smaller product range and choice than one would normally expect. Some are also operating from a much smaller floor plate than they would normally occupy. There is clearly a need to increase the extent of larger retail floor plates in the city area to cater for the needs of these types of retailers. There is also a need to try and attract further large department/variety stores to the city in order to enhance retail attraction and anchor the city as a major retail destination.

5.8.8 There are concerns however, about the continuing loss of comparison and convenience retailers in the prime retail pitch and the introduction of less desirable retail services and low order retail functions to these areas. In this regard, the Council may need to consider measures to restrict such uses in the prime retail streets such as a special planning control scheme.

5.8.9 Vacancy rates are generally low in the prime retail pitch, although vacancy rates are increasing in the secondary streets and along Michael/John Street as you transition to the night-time economy area. This is a matter that will need ongoing review and monitoring. It is notable however, that there are a number of significant derelict or obsolete sites on the more peripheral retail streets. There is a clear need to incentivise the rejuvenation and redevelopment of these buildings as they clearly detract from the attractiveness and vibrancy of the City. Given their peripheral location, some may not be appropriate for major high street retail development, but could be developed for complementary food and beverage or specialist retail use. In the interim, short term measures such as painting the exterior of such structures could be considered to improve their visual appearance.

5.8.10 Overall Waterford City has a healthy and vibrant City Centre. Nonetheless there is clearly scope for improvement and the City needs to further develop, strengthen and enhance its retail core, attraction and offer in order to compete more effectively with competing centres and to develop a retail profile that is line with its designation as a City of national significance. The City is clearly vulnerable to external pressures and there is a danger that it may decline and its retail function erode unless there is further significant retail investment and development in the next number of years.

5.8.11 Both Dungarvan and Tramore are well presented towns with attractive environments. However due to their geographic locations they have very different roles and functions. Dungarvan is an important market town with an extensive catchment area in the west of the county. Because of this it has a much more developed retail function, and does have a range of comparison outlets in its retail offering. Dungarvan has also been developing well as a tourism destination, with a particular focus on activity holidays, and on food tourism. Dungarvan town centre is both well presented and has good vitality, with relatively little ground floor vacancy, which is largely limited to one small area.

5.8.12 Tramore, is also well presented and served a very different function as being both a dormitory town for Waterford city, as well as being an important tourist destination in its own right, as a seaside resort. Tramore has a good convenience retail offering, but does not have comparison shopping, as this is provided in the nearby city.

CHAPTER 6

Quantitative Assessment

6.1 INTRODUCTION

6.1.1 This section provides an assessment of the likely capacity in quantitative terms for additional retail floorspace in Waterford City & County. In the strategy, we cover the period from 2016-2026 and 2026 to 2031. In respect of looking beyond 2026, this enables a longer term look at retail planning and potential in the catchment area which is consistent with the Regional Planning Guidelines. The base year for the purposes of the study is 2016.

6.1.2 It should be noted that a quantitative assessment of this nature can only act as a broad brush indicator of the likely quantum of floorspace that may be required in an area over a given period. It involves making forecasts for future population expenditure, turnover and other factors and as such the study is based on a number of assumptions and therefore can only provide a broad indication of anticipated capacity. Nonetheless, the quantitative section can give a useful overview of the position.

6.1.3 Furthermore, it should be noted that the figures set out in this section are not intended to be prescriptive thresholds. Rather they are the minimum floorspace targets that need to be achieved in order to ensure that the retail function of Waterford City, Dungarvan & Tramore continues to be reinforced and strengthened.

6.1.4 It should be noted that all figures within this assessment are rounded off to the nearest point of decimal. The base year and price year throughout is 2016.

The Approach

6.1.5 The approach taken is a step by step capacity assessment including the following steps:

- Estimate the population at base and design year.
- Estimate of expenditure per capita on convenience, comparison and bulky household goods at the base year and the design year.
- Incorporate projections on inflows and outflows of expenditure to the catchment area based on the results of the shopper's and household surveys undertaken by Demographics Ireland.
- Estimate of total available expenditure in the base year and design year for residents within the Waterford City & County catchment.
- Estimate the likely increase in expenditure available for provision of additional floorspace,
- Estimate the likely average turnover of new floorspace in convenience and comparison goods.
- Estimate the capacity for additional floorspace in Waterford City & County.

6.2 DEFINITION OF STUDY AREA

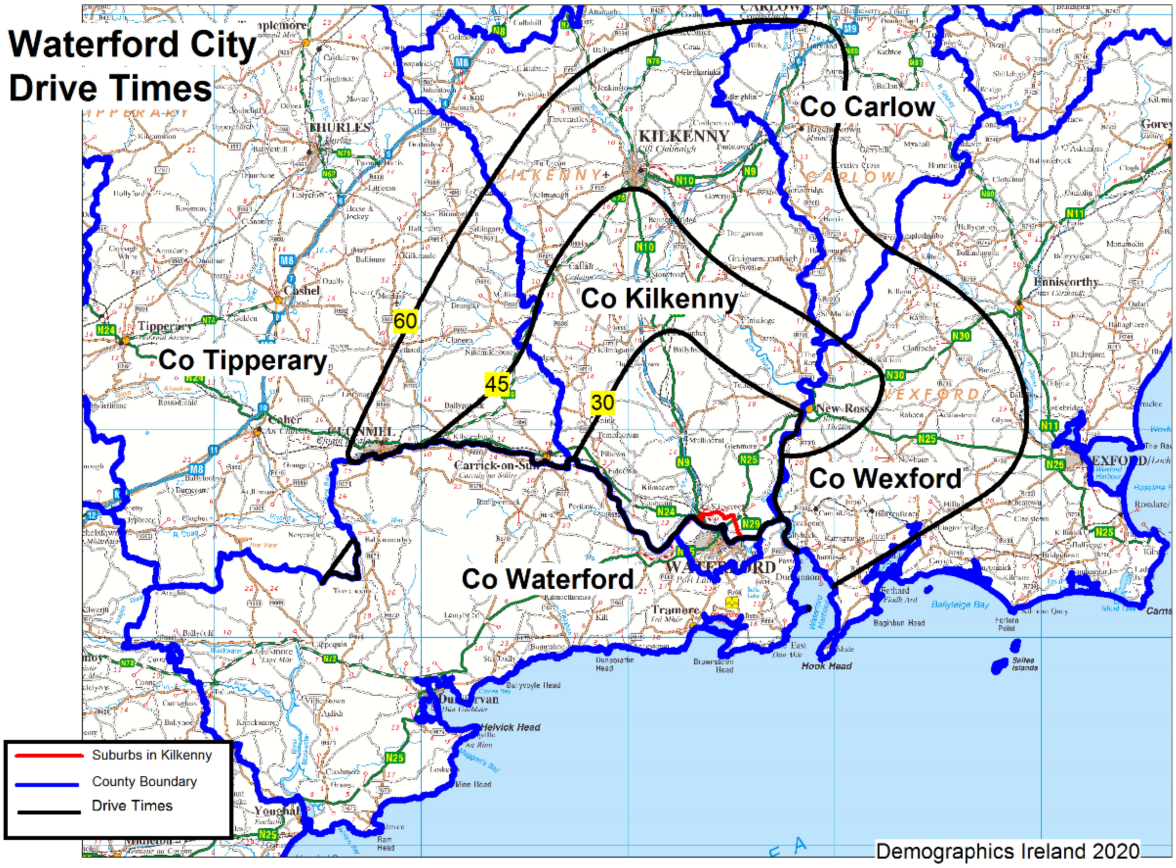
6.2.1 John Spain Associates have carried out a number of previous retail studies for the former Waterford City Council, most notably the 2011 Waterford City Retail Strategy and the 2017 Updated Quantitative Assessment, to assist with the preparation of the North Quays SDZ Planning Scheme. Both these studies used the same catchment area for the city which was the area within the former administrative area of Waterford City Council, together with those areas beyond the city boundary within a 30 minutes drive time, 45 minutes, and 60 minutes drive time respectively, as shown on Map 6.1 below.

6.2.2 For the purposes of this assessment, which is now for the combined Waterford City & County Council area, the study areas consists of the amalgamated Waterford City & County area, plus the city's previously defined catchment area extending into South Kilkenny and parts of Carlow, Tipperary and Wexford counties. namely:

- Waterford City & County Council Administrative Area.
- 0 to 30 minute isochrone from the City Centre excluding the Waterford Council area.
- 30-45 minute isochrone from the city centre, excluding the Waterford Council area.
- 45-60 minute isochrone from the city centre, excluding the Waterford Council area.

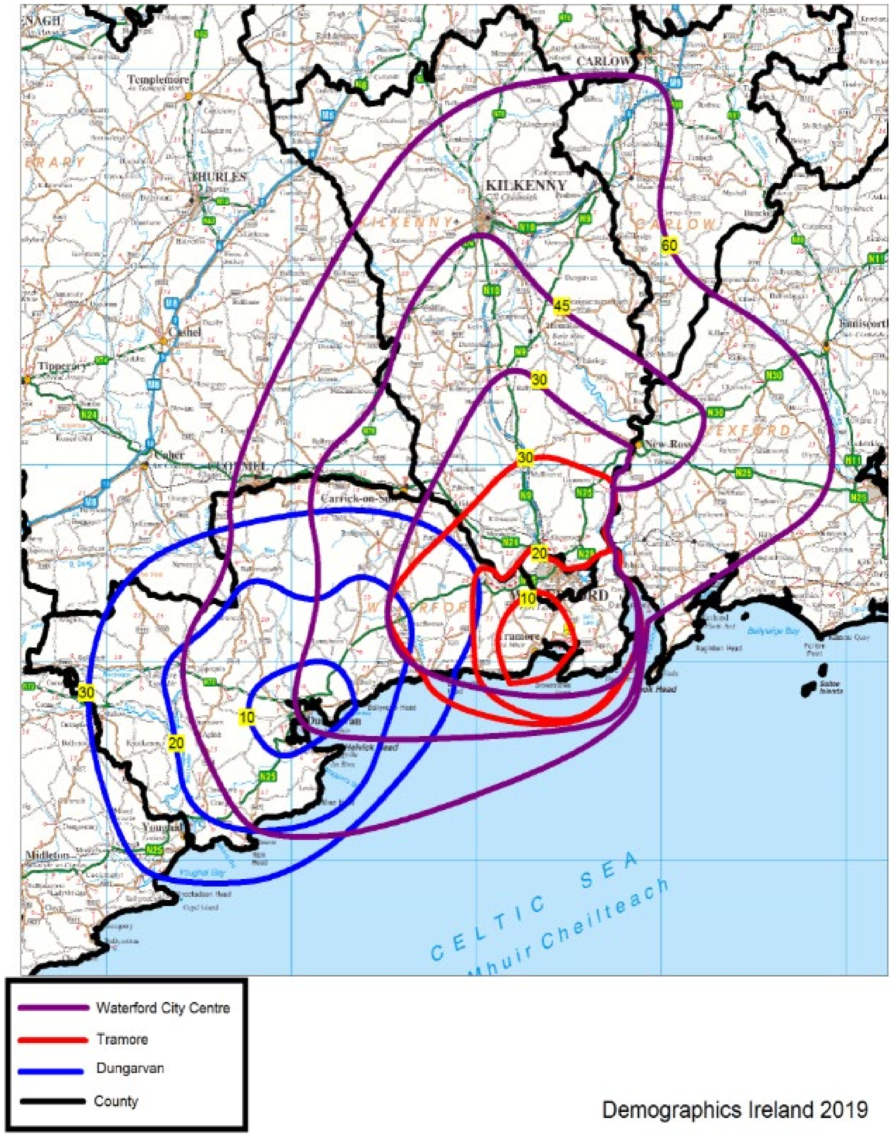
6.2.3 The study area for the purposes of this assessment is identified in Figure 6.1 prepared by Demographics Ireland.

Figure 6.1 Map of Waterford City & County Catchment Area



6.2.4 This approach to the study area has been taken to ensure that there is no double counting arising from overlapping catchment areas between the City & County in Waterford. Furthermore, as shown on Figure 6.2 below identifying the drive times from the three principal urban centres in Waterford (Waterford City, Dungarvan & Tramore), the Dungarvan catchment is almost totally contained within the county, and the Tramore catchment is wholly contained within the Waterford city catchment area. Accordingly, the combined city and county council areas together with the Waterford city catchment area provides a good representation of the total catchment area for Waterford City & County. Furthermore, over the last eight years there has been no significant retail developments either within Waterford City & County or within the neighbouring towns in the hinterland area, which would have any material effect to modify the prevailing catchment area for the city and county.

Figure 6.2 Drive Times for Waterford's Principal Urban Centres



Demographics Ireland 2019

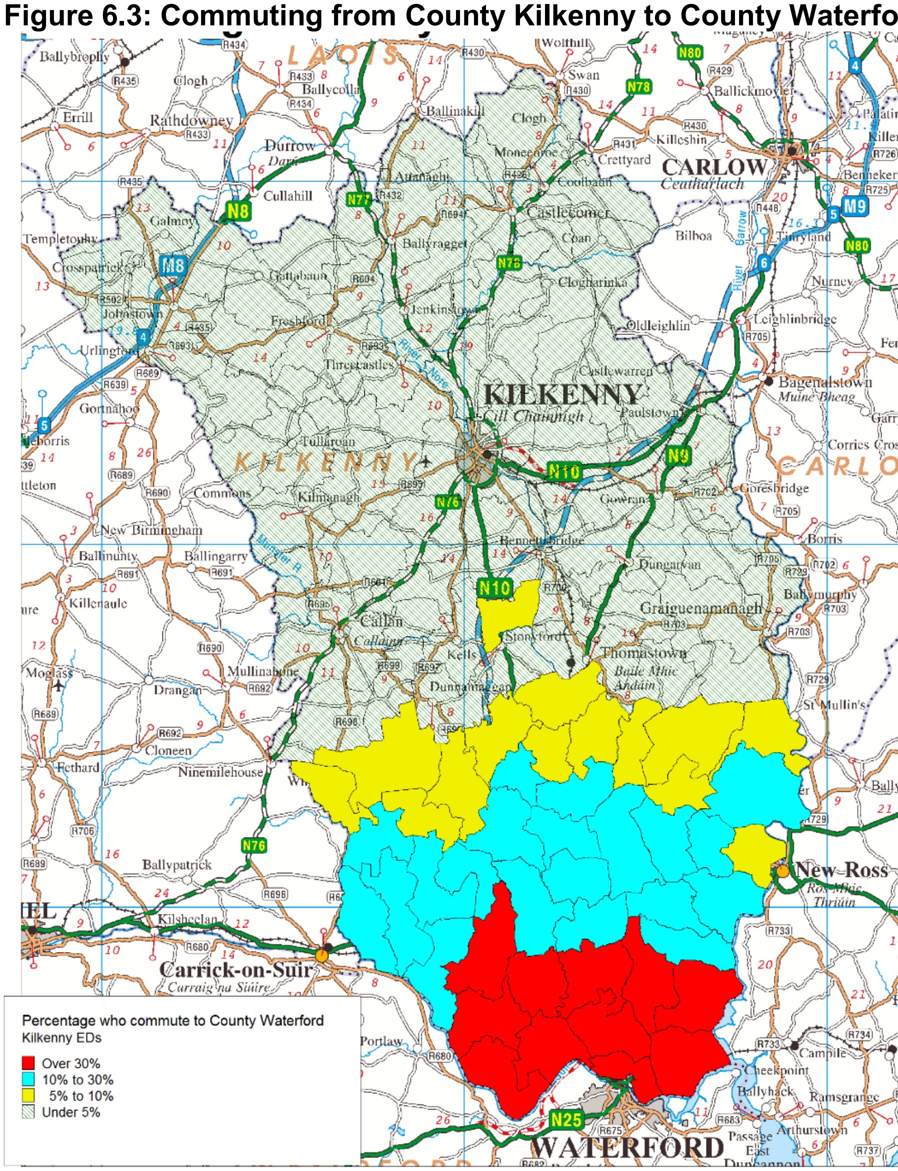
6.2.5 It is acknowledged that the above drive time isochrones are based on the prevailing road network in 2011, when the city's catchment area was previously established, and that since then the road network in the region has considerably improved, most notably with the opening of the M9 motorway. However, to ensure comparability between the 2011 strategy and the current strategy it was decided to retain the same geographic coverage. While other studies, such as the 2020 Rikon[8] report have used a much larger theoretical retail catchment area for Waterford city, stretching well beyond Carlow town based on the distance which can now be driven within one hour, this is unlikely to be a true reflection of Waterford actual current catchment, given what is known on the relatively low levels of retail expenditure in the 45+ minute isochrone in Waterford city.

[8] Waterford 2040 Regional City of Scale: Strategic Investment to 2040, Rikon 2020.

6.2.6 Thus the catchment used in this report could be considered like a weighted catchment compared to the Rikon's more theoretical catchment if Waterford city was fully operating as the regional retail centre for the entire south-east region. In fact it should be noted that the influence of Waterford city as a retail destination on the larger towns beyond this study's defined catchment area, such as Carlow, Castledermot, Wexford, Enniscorthy, Cahir & Youghal, diminishes the further you travel from Waterford city, and are more likely to be influenced by Cork & Dublin.

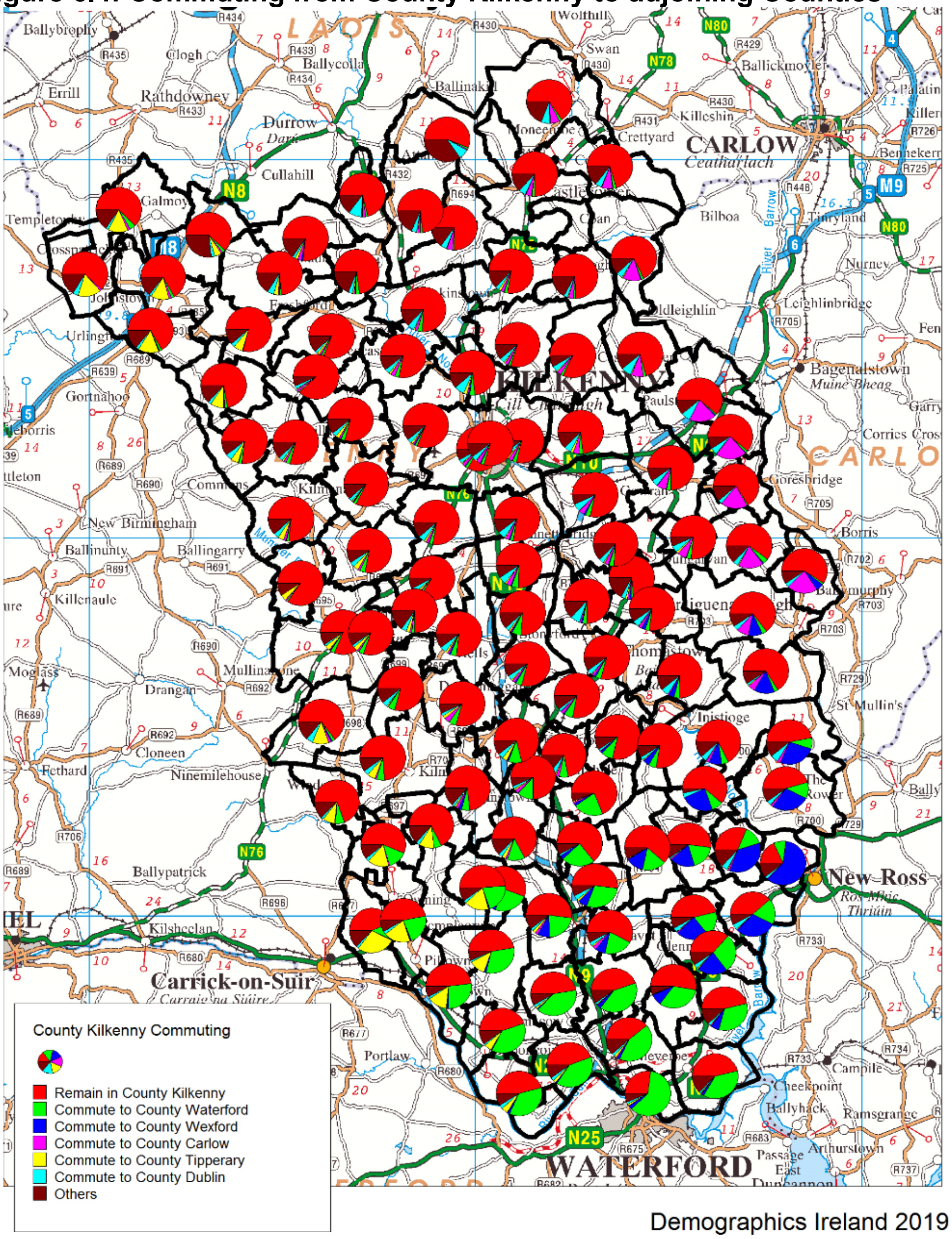
6.2.7 To illustrate this point, it is possible to utilise data on commuting patterns from the 2016 census as a proxy to demonstrate how there is significant drop off in attraction of Waterford to Kilkenny residents as one moves northwards through the county, and this is well illustrated in Figures 6.3 & 6.4 below. Such commuter patterns are likely to be replicated in the other adjoining counties.

Figure 6.3: Commuting from County Kilkenny to County Waterford



Demographics Ireland 2019

Figure 6.4: Commuting from County Kilkenny to adjoining Counties



Demographics Ireland 2019

6.3 POPULATION OF STUDY AREA

6.3.1 The 2016 Census of population identifies a population of 116,176 for Waterford City & County. A drivetime was commissioned from Demographics Ireland as part of the Household Survey undertaken to inform the Retail Strategy.

6.3.2 Table 6.1 below shows the population of the administrative boundary of Waterford City & County, a 0-30 drivetime isochrone from the City excluding the Waterford City & County administrative area, a 0-45 drivetime isochrone and a 45-60 minute isochrone of the City Centre in 2016, 2026 and 2031. The population figures for 2016 are based on the 2016 census results.

6.3.3 The Settlement Strategy included within the Regional Spatial & Economic Strategy (RSES) sets out the target population for the region and for each county the region. It is envisaged that by 2026, the population of Waterford City & County will be 134,000, and 140,500 by 2031.

6.3.4 The population growth rates assumed for the areas outside of the administrative boundary of Waterford City & County are based on those set out within the RSES for the Southern Region. The RSES estimate a growth rate for Cos. Kilkenny, Carlow, Tipperary and Wexford of 10% between 2016 and 2026. An average growth rate of 4% for the 5 years between 2026 and 2031 is applied having regard to the RSES projected average growth rates.

Table 6.1: Population Projections

Year	Waterford City & County	0-30 minute Isochrone (Excl Waterford City & Co.)	30-45 minute isochrone	45-60 minute isochrone	Total
2016 (Actual)	116,176	22,242	52,467	99,188	290,073
2026 (Estimate)	134,000	24,555	57,714	109,107	325,376
2031 (Estimate)	140,500	25,537	60,023	113,471	339,531

Source: CSO, Demographics Ireland & Regional Spatial & Economic Strategy for the Southern Region 2019,

6.4 EXPENDITURE PER CAPITA

6.4.1 The Retail Planning Guidelines Study examines three principal sources of data on retail planning expenditure in Ireland. These are the Annual Services Inquiry, the National Income and Expenditure Accounts and the Household Budget Survey. The survey concludes that the most reliable data source for established baseline expenditure is the Annual Services Inquiry. This is consistent with the source used within the 2003 Waterford City Study and the Waterford City Retail Strategy 2012.

6.4.2 Expenditure per capita is calculated based on the information contained within the Annual Services Inquiry (ASI) published by the Central Statistics Office. The ASI is listed as the preferred source for expenditure per capita listed in the 1999 Roger Tym and Partners and Jonathan Blackwell and Associates report on the Retail Planning Guidelines and is consistent with the source used within 2003 Waterford City Study and Waterford City Retail Strategy 2011. This source is therefore used for the purposes of this capacity assessment.

6.4.3 The CSO have provided information on the most appropriate categories to consider when making estimates on expenditure per capita. The relevant categories include:

1. Retail sale in non-specialised stores (471)
2. Retail sale of food, beverages and tobacco in specialised stores (472)
3. Retail sale of information and communication equipment in specialised stores (474)
4. Retail sale of other household equipment in specialised stores (475)
5. Retail sale of cultural and recreation goods in specialised stores (476)
6. Retail sale of other goods in specialised stores (477)
7. Retail sale via stalls and markets (478)

6.4.4 In accordance with the guidance set out within the Roger Tym and Partners / Jonathan Blackwell & Associates background study on the Retail Planning Guidelines, Categories 1 and 2 are classified as convenience goods expenditure. Categories 3-7 are classified as comparison expenditure for the purposes of this study. However, there is the exception of department stores which are classified under Item 1. The CSO have provided further information on the breakdown of the retail sale in non – specialised stores category and from this breakdown it is apparent that sales in department stores account for approximately 12% of the amalgam of convenience and department store category in 2016 and 2017, having risen from 7.3% in 2010. The CSO have provided estimates for each year from 2010 to 2017 and these have been used for calculating the changing expenditure estimates. The turnover attributed to expenditure in department stores is classified as comparison expenditure for the purposes of this study.

6.5 EXPENDITURE ESTIMATES

6.5.1 Based on the 2016 Annual Service Inquiry we have estimated that the total expenditure per capita in 2016 on convenience goods was €3,558 and €4,045 on comparison goods. These expenditure per capita figures are in fact lower than those recorded in 2010

6.5.2 Set out in Table 6.0 below is an estimation of turnover per capita for convenience and comparison for each year 2010 to 2017 based on the data supplied by the CSO.

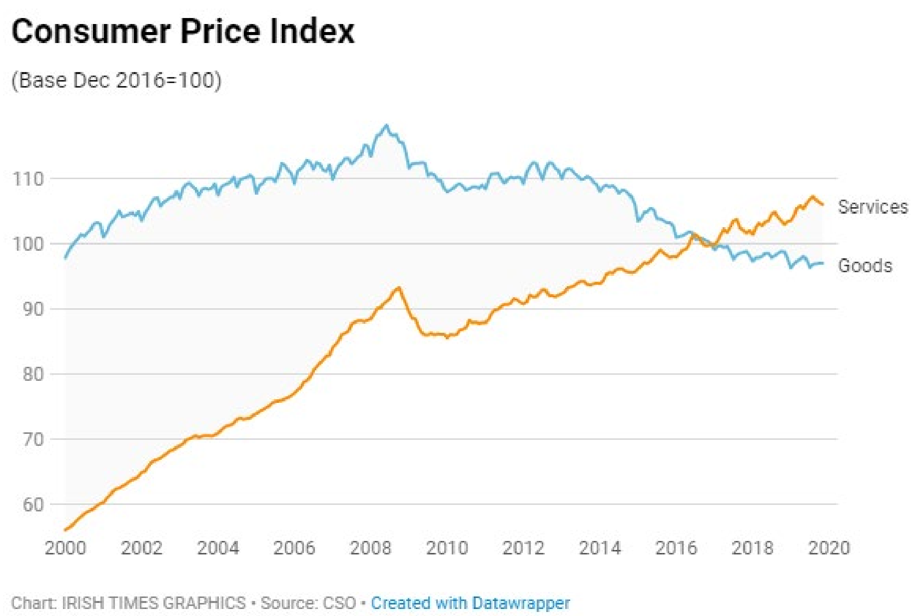
Table 6.0: Expenditure per capita 2010 to 2017		
	Convenience	Comparison
2010	€3,593	€4,206
2011	€3,710	€3,832
2012	€3,511	€3,725

2013	€3,564	€4,169
2014	€3,678	€3,890
2015	€3,220	€3,613
2016	€3,558	€4,045
2017	€3,360	€4,043

Source: Annual Service Inquiry 2010-2017, CSO

6.5.3 These figures illustrate how convenience and comparison expenditure per capita has fluctuated over the last decade. Of note is the fact that, notwithstanding the growth in retail sales in recent years, as recorded in the Retail Sales Index, this is being cancelled out by negative inflation in the costs of goods, as shown on Figure 6.3 below.

Figure 6.3: Changes in Consumer Price Index 2000-2020



6.5.4 In light of these countervailing trends we have had to take a more caution approach to projecting forward estimates of expenditure per capita.

<u>Convenience Expenditure Forecast</u>

6.5.5 Taking a conservative approach we have applied a 0% growth per annum between 2016 and 2031.

<u>Comparison Expenditure Forecast</u>

6.5.6 Expenditure growth on comparison goods has been generally been higher than expenditure growth on convenience goods over time. This is because most household's requirements in respect of convenience products have been largely satisfied and most additional expenditure has gone into products such as clothing, footwear, household goods, electrical goods, carpets, furniture and so on.

6.5.7 However, as a result of the more up to date CSO turnover data supplied through the ASI a relatively cautious approach is recommended for projecting forward turnover on comparison goods. We have therefore used a conservative long term average of 2.0% per annum between 2016 and 2031. This is illustrated in Table 6.2.

Table 6.2: Expenditure per capita		
	Convenience	Comparison
2016	€3,558	€4,045
2026	€3,558	€4,932
2031	€3,558	€5,451

Assumption: Convenience Goods Expenditure 0% growth rate annum from 2016 to 2031; Comparison Goods Expenditure 2.0% growth rate per annum from 2016 to 2031.

6.6 TOTAL AVAILABLE EXPENDITURE

6.6.1 The total available expenditure is set out in Tables 6.3 and 6.4 below. This is calculated by multiplying the population by the expenditure per capita for each category for each year. For the convenience capacity assessment we have used a 0-30 minute isochrone catchment having regard to the results of the household and shopper's survey set out in Chapter 4 of the 2011 strategy. As relatively little new floorspace has been provided in Waterford City & County or is catchment area since 2011, and given the similarities between the 2011 and 2019 household survey findings we have maintained the same percentages for inflows and outflow as used in 2011 and 2017 quantitative analysis. The survey results illustrated an inflow of 8% of convenience expenditure from the 30-45 minute drivetime isochrone for convenience goods, with no inflow from the 45-60 minute drivetime isochrone for convenience goods. In 2016, we estimate the total available for convenience expenditure is €413m within the City & County and €79m within the 0-30 minute drive time isochrone of the City Centre (excluding the Waterford City & County area). The total available expenditure for convenience goods is identified within Table 6.3 at c. €679 million in 2016, €769 million in 2026, and €853 million in 2031.

6.6.2 In relation to expenditure on internet an adjustment for existing levels of internet sales has already been made to the Annual Services Inquiry expenditure per capita figures in the omission of the category of "retail sales not in stores, stalls or markets". This category includes internet shopping by retail stores that have a physical presence in Ireland. While existing trends as evidenced from the household survey and the Annual Services Inquiry are low at 3.3 % (Source ASI

2017), it is likely that this format of retailing will continue to grow over the lifetime of the retail strategy.

6.6.3 On-line sales is an emerging trend and is likely to continue to become a more popular form of retailing as technologies improve and retailers embrace and promote this retail format. In this regard, it is recommended that expenditure data is regularly reviewed and adjusted over the life time of the study to account for any notable increase documented by the CSO (RSI in 2019 for first time now includes data on on-line sales) or other verifiable source in terms of internet sales expenditure and that the implications for retail floorspace requirements are monitored. It is recognised that there may not be a direct link between increase in internet retailing and retailers floorspace requirements.

Table 6.3: Total Available Convenience Expenditure

Year	Waterford City & County	0-30 minute Isochrone (Excl Waterford City & Co.)	30-45 minute Isochrone	Total
2016	€413,354,208	€79,137,036	€186,677,586	€679,168,830
2026	€476,772,000	€87,366,690	€205,346,412	€769,485,102
2031	€499,899,000	€105,010,949	€247,711,962	€852,621,911

Source: Tables 6.1 and 6.2

6.6.4 Table 6.4 below sets out the total available comparison expenditure within Waterford City & County, a 0-30 minute isochrone excluding Waterford City & County and 30-45 minute isochrone. These isochrones are included having regard to the results of the household survey which illustrates an inflow of 90% from the 0-30 minute drivetime isochrones, 52% from the 30-45 minute isochrones and 8% from the 45-60 minute isochrone. In 2016 it is estimated the total available for comparison expenditure is €470m within Waterford City & County and €90m within the 0-30 minute drive time isochrone of the City Centre (excluding the City & County area). By 2031, assuming an increase of the City & County population to 140,500 the total available comparison expenditure is €766m within the City & County.

Table 6.4: Total Available Comparison Expenditure (including Bulky Household Goods)

	Waterford City & County	0-30 minute Isochrone Excl Waterford City & Co.	30-45 minute Isochrone	45-60 minute Isochrone	Total
2016	€469,931,920	€89,968,890	€212,229,015	€401,215,460	€1,173,345,285
2026	€660,888,000	€121,105,260	€284,645,448	€538,115,724	€1,604,754,432
2031	€765,865,500	€160,881,024	€379,504,751	€717,447,486	€2,023698,761

Source: Tables 6.1 and 6.2

6.6.5 Table 6.4 sets out the total available comparison expenditure available within the administrative boundary of Waterford City & County Council and a 0-30 and 30 to 45 minute isochrone from the City. In considering the above expenditure levels it is important to note that significantly different levels of turnover will apply to town centre comparison goods such as clothing and footwear and smaller household durables than would apply to bulky household goods sold in retail warehouses. Retail warehouses have a distinct function and are generally located outside of the City/Town Centre. It is necessary to establish the expenditure potentially available to City & County comparison floorspace. In this regard it is considered important to split between expenditure available for bulky warehouse goods and comparison goods within the catchment area. Having regard to the Household Budget Survey and experience elsewhere in this respect, it is estimated that approximately 20% of comparison expenditure will be accounted for by bulky household goods in retail warehouse type premises. This is the same figure as used in the 2012 city retail strategy and the 2017 update. While there has been some blurring of the demarcation between general comparison and bulking goods sold in establishments, this percentage split is still considered appropriate.

6.6.6 Estimates for expenditure on pure comparison floorspace, and on bulky household goods are set out in Tables 6.5 and 6.6 below.

Table 6.5: Total Available Expenditure on Comparison Floorspace (excluding bulky household goods)

	Waterford City & Co.	0-30 minute Isochrone excl Waterford City & Co.	30-45 Minute Isochrone	45-60 minute Isochrone	Total
2016	€375,945,536	€71,975,112	€169,783,212	€320,972,368	€938,676,228
2026	€528,710,400	€96,884,208	€227,716,358	€430,492,579	€1,283,803,546
2031	€612,692,400	€128,704,819	€303,603,801	€573,957,989	€1,618,959,009

Source: Table 6.5 above, Assumption 80% of total set out in Table 6.4

Table 6.6 Total Available Bulky Household Goods Expenditure					
	Waterford City & Co.	0-30 minute Isochrone excl Waterford City & Co.	30-45 Minute Isochrone	45-60 minute Isochrone	Total
2016	€93,986,384	€17,993,778	€42,445,803	€80,243,092	€234,669,057
2026	€132,177,600	€24,221,052	€56,929,090	€107,623,145	€320,950,886
2031	€153,173,100	€32,176,205	€75,900,950	€143,489,497	€404,739,752

Source: Table 6.6 above, Assumption 20% of total set out in Table 6.5

6.7 ADJUSTMENTS TO AVAILABLE EXPENDITURE

6.6.7 Some adjustments are also required to the capacity figures outlined in Tables 6.4, 6.5 and 6.6 above to take into account the levels of trade draw and leakage of expenditure from the catchment area. Assumptions on both market share and trade draw are informed by the household and shoppers surveys undertaken by Demographics Ireland, the results of which are summarised in Chapter 4 of the Retail Strategy.

Convenience:

6.6.8 The survey establishes that approximately 95% of convenience goods expenditure in Waterford City & County is retained within the City & County, and the City attracts approximately 58% of convenience goods expenditure from the 0-30 minute isochrone from the City. The household survey also identifies an inflow of 8% of expenditure on convenience goods from the 30-45 minute isochrone. It is envisaged that this level expenditure inflows and retention will continue throughout the lifetime of the retail strategy and up until 2031.

Table 6.7: Total Available Convenience Expenditure to Waterford City & County				
Year	Waterford City & County	0-30 minute Isochrone excl Waterford City & County	30-45 minute isochrone	Total Available Expenditure
2016	€392,686,498	€45,899,481	€14,934,207	€453,520,185
2026	€452,933,400	€50,672,680	€16,427,713	€520,033,793
2031	€474,904,050	€60,906,350	€19,816,957	€555,627,357

Sources: Tables 6.3, 6.5 and 6.6

Comparison:

6.6.9 The household survey establishes that approximately 92% of comparison goods expenditure in Waterford City & County is retained by the County and attracts a further 90% of comparison expenditure from the 0-30 minute drivetime isochrone and 52% from the 30-45 minute isochrone. The survey identifies an inflow of 8% of comparison expenditure from the 45-60 minute drivetime. Two scenarios are assumed in estimating the amount of expenditure available within the study area for the purposes of this assessment. Scenario 1, the low growth scenario assumes that the retention and inflow of expenditure to Waterford City & County will remain at current levels over the lifetime of the retail strategy and up until 2040.

6.6.10 Scenario 2 estimates that the level of trade draw from the 0-30, 30-45 and 45-60 minute isochrones and retention of comparison expenditure within the City & County will increase within the timeframe of the Retail Strategy in line with improvements to the retail offer and trade draw of the City & County. For the purposes of this assessment it is assumed that by 2026 the City Centre area will retain 94% of comparison goods expenditure within the City and this is envisaged to grow to 96% by 2031. Trade draw from the 0-30 minute drivetime isochrone is envisaged to grow to 94% by 2026 and 96% by 2031. Inflows from the 30-45 drivetime isochrone are estimated to grow to 55% by 2026 and 60% by 2031. Inflows from the 45-60 minute drivetime isochrone are anticipated to remain at 8%. Based on these projections the total available comparison expenditure for both Scenario 1 and 2 are set out in 6.8 below.

Table 6.8: Total Available Comparison Expenditure to Waterford City & County (excluding bulky household goods)

	Waterford City & Co.	0-30 Minute Isochrone	30 to 45 min isochrone	45 to 60 min isochrone	Total Available Expenditure
SCENARIO 1: Base Year Inflows to be Retained to 2026					
2016	€345,869,893	€64,777,601	€88,287,270	€25,677,789	€524,612,554
2026	€486,413,568	€87,195,787	€118,412,506	€34,439,406	€726,461,268
2031	€563,677,008	€115,834,337	€157,873,976	€45,916,639	€883,301,961
SCENARIO 2: Increase in Inflows & Trade Retention in 2026 and 2031					
2016	€353,388,804	€67,656,605	€93,380,767	€25,677,789	€540,103,965
2026	€507,561,984	€93,008,840	€136,629,815	€34,439,406	€771,640,045
2031	€588,184,704	€123,556,626	€182,162,280	€45,916,639	€939,820,250

Bulky Household

6.6.11 The household survey establishes that approximately 69.5% of bulky goods expenditure in Waterford City & County is retained by the County and the City attracts a further 50% from the 0-30 minute isochrone, 9% from the 30-45 minute isochrone and 8% from the 45-60 minute isochrone. As with comparison goods, two alternative growth scenarios are assumed for bulky goods expenditure over the lifetime of the retail strategy. Scenario 1 assumes that existing retention and inflows of bulky goods expenditure will remain at current levels throughout the lifetime of the strategy. Scenario 2 assumes that bulky goods expenditure retention levels will increase to 70% by 2026 and 72% by 2031. It is also assumed that inflows of expenditure from the 0-30 minute isochrone will increase to 52% by 2026 and 55% by 2031. Inflows of expenditure from the 30-45 and 45-60 minute isochrones are anticipated to remain at current levels. The total available bulky goods expenditure under both scenarios are set out in Table 6.9 below.

Table 6.9: Total Available Bulky Goods Expenditure to Waterford City & County

	Waterford City & Co.	0-30 Minute Isochrone	30 to 45 min isochrone	45 to 60 minute isochrone	Total Available Expenditure
SCENARIO 1: Base Year Inflows to be Retained to 2026					
2016	€65,320,537	€8,996,889	€3,820,122	€6,419,447	€84,556,996
2026	€91,863,432	€12,110,526	€5,123,618	€8,609,852	€117,707,428
2031	€106,455,305	€16,088,102	€6,831,086	€11,479,160	€140,853,652
SCENARIO 2: Increase in Inflows & Trade Retention in 2026 and 2031					
2016	€65,790,469	€9,356,765	€3,820,122	€6,419,447	€85,386,803
2026	€95,167,872	€12,594,947	€5,123,618	€8,609,852	€121,496,289
2031	€100,284,632	€16,731,626	€6,831,086	€11,479,160	€145,326,504

6.7 EXISTING RETAIL FLOORSPACE IN CATCHMENT AREA

6.7.1 The existing retail floorspace within the catchment area is based on figures provided by Waterford City & County Council. Since the 2011 retail strategy, Waterford City and County Council issued a notification of decision to grant planning permission (Reg. Ref. 16/175) for a shopping centre development at St. Stephens Street, New Street and John's Lane, Waterford which includes a retail gross floor area of 10,030 sq. m (9,616 sq.m net lettable comparison floor area) including 1 anchor store and 5 Medium Sized Units and 10 other units. Based on a reasonable market assumption that 30% of the net lettable retail area of 9,616 sq. m. will be occupied for convenience retailing, it is estimated that this development will provide approximately 6,731 sq. m. of net comparison floorspace. Following a number of third party appeals, An Bord Pleanála granted permission for the development on the 20th of February 2017. For the purposes of this assessment this permitted floorspace has not been included in the capacity assessment as it has not been constructed and is therefore considered pipeline floorspace. In addition, a planning application has recently been lodged for a very large mixed use development on the North Quays. Again while a figure has been set aside to account for this planned additional floorspace, it has not been include the total existing retail floorspace with the City & County.

Table 6.10: Existing Retail Floorspace within Waterford City & County

	Convenience sq.m.	Comparison sq.m.	Bulky sq.m.	Total sq.m.
Existing Floorspace Waterford City	34,624	38,480	55,993	147,956
Existing Floorspace Dungarvan	10,092	10,686	17,634	38,412
Existing Floorspace Tramore	10,108	2,235	2,202	14,545
Existing Floorspace in other towns in county	4,256	2,440	-	6,696
Total Floorspace City & Co.	59,080	53,841	75,829	188,750

Source: Waterford City and County Council 2019

6.8 TURNOVER OF EXISTING FLOORSPACE

6.8.1 It is possible to derive the turnover of existing floorspace within the catchment area by multiplying the floorspace in each category by average turnover. A turnover of €9,225 per sq. m. is assumed for existing convenience floorspace within the catchment area in 2016 and €6,150 per sq. m. for comparison floorspace. An average turnover of €2,050 per sq. m. is assumed for bulky goods in 2016 prices. The figures are based on published retail industry data and have regard to the average turnover per sq.m. calculations established in the Retail Planning Guidelines Study 1999 (Tym and Blackwell)[9]. They reflect the average turnover levels retailers will require to sustain a healthy level of activity. We have applied a constant figure over the period 2016 – 2031

[9] There are no published data on turnover per square meter of retail floor space for Irish retailers. These figures used here are based on turnover figures from annual reports of UK retailers, particularly those who have Irish operations, and from the UK Data House Retail Rankings, which have been adapted for the Irish market place and which we have used in other retail strategies in Ireland. We have taken an average figure between multiples and smaller shops and independents.

Table 6.11 Turnover per sq.m. of Existing Retail Floorspace						
	2016	2026	2031			
Convenience	€9,225	€9,225	€9,225			
Comparison	€6,150	€6,150	€6,150			
Bulky	€2,050	€2,050	€2,050			

6.8.2 These figures show the average turnover per sq. metre of existing floor space overall in Waterford City & County. They disguise significant differences in turnover for different shops. In general, multiple branches of national and international multiple shops are located within purpose built shopping centres or other prime locations. Prime town centre shop units will have substantially higher turnover per square metre than shops which are less well located or situated in older inefficient premises and are operated as independents. In particular, it is likely that smaller units have substantially lower turnover per sq. metre than these averages whilst the largest supermarket operators have substantially higher turnover rates per sq. metre.

6.8.3 The turnover of existing retail floorspace within the City & County in 2026 and 2031 is obtained by multiplying the existing floorspace estimates set out in Table 6.10 by the turnover per sq. m. estimates set out in Table 6.11. This is illustrated in Table 6.12 below.

Table 6.12: Turnover of Existing Retail Floorspace			
	2016	2026	2031
Convenience	€545,013,000	€545,013,000	€545,013,000
Comparison	€331,122,150	€331,122,150	€331,122,150
Bulky	€155,449,450	€155,449,450	€155,449,450

Source: Tables 6.10 and 6.11

6.8.4 The residual surplus for additional retail floorspace within the City & County is obtained by subtracting the turnover of existing convenience, comparison and bulky goods expenditure as set out in Table 6.12 by the total available expenditure set out in tables 6.7, 6.8 and 6.9. Tables 6.13 a and b below set out the available expenditure under Scenario 1 and 2.

Table 6.13a: Scenario 1 Available Expenditure for Additional Retail Floorspace in Waterford City & County			
Year	Available Expenditure	Turnover of Existing Floorspace	Residual Surplus
Convenience			
2016	€453,520,185	€545,013,000	-€91,492,815
2026	€520,033,793	€545,013,000	-€24,979,207
2031	€555,627,357	€545,013,000	€10,614,357

Comparison			
2016	€524,612,554	€331,122,150	€190,490,404
2026	€726,461,268	€331,122,150	€395,339,118
2031	€883,301,961	€331,122,150	€552,179,811
Bulky			
2016	€90,461,625	€155,449,450	-€70,892,454
2026	€126,163,795	€155,449,450	-€37,742,022
2031	€150,274,513	€155,449,450	-€14,595,798

Source: Tables 6.12, 6.6, 6.8 & 6.9

Table 6.13b: Available Expenditure for Additional Retail Floorspace in Waterford City & County Scenario 2

Year	Available Expenditure	Turnover of Existing Floorspace	Residual Surplus
Convenience			
2016	€453,520,185	€545,013,000	-€91,492,815
2026	€520,033,793	€545,013,000	-€24,979,207
2031	€555,627,357	€545,013,000	€10,614,357
Comparison			
2016	€540,103,965	€331,122,150	€208,981,815
2026	€771,640,045	€331,122,150	€440,517,895
2031	€939,820,250	€331,122,150	€608,698,100
Bulky			
2016	€91,321,433	€155,449,450	-€70,062,647
2026	€129,952,656	€155,449,450	-€33,953,151
2031	€154,747,364	€155,449,450	-€10,122,946

Source: Tables 6.12, 6.6, 6.8 & 6.9

6.9 FLOORSPACE CAPACITY

6.9.1 In order to calculate the requirements for additional retail floorspace within the catchment area the turnover per sq. m. of future retail floorspace should be divided by the available expenditure figures set out in Table 6.13. For the purposes of this assessment a turnover per sq. m. of €12,300 is assumed for future convenience floorspace, €7,175 for comparison retail floorspace and €2,562 for bulky goods floorspace in 2016 prices[10]. The figures for expenditure have been maintained for the full period 2016 to 2031 as illustrated in Table 6.14 below.

Table 6.14 Turnover of Future Retail Floorspace 2016, 2026 and 2031

	2016	2026	2031
Convenience	€12,300	€12,300	€12,300
Comparison	€7,175	€7,175	€7,175
Comparison Bulky	€2,562	€2,562	€2,562

6.9.2 The future floorspace requirements for additional convenience, comparison and bulky goods floorspace within the catchment is illustrated in Table 6.15.

Table 6.15 Additional Floorspace Requirements for Waterford City & County

	2016	2026	2031		
Convenience sq.m.	-7,438	-2,031	863		
Comparison sq.m.	26,967	55,100	76,959		
Bulky Goods sq.m.	-27,671	-14,731	-5,697		
SCENARIO 2: Increase in Inflows & Trade Retention in 2026 and 2031					
Convenience sq.m.	-7,438	-2,031	863		
Comparison sq.m.	29,126	61,396	84,836		
Bulky Goods sq.m.	-27,347	-13,253	-3,951		

Source: Tables 6.14, 6.13a & 6.13b

6.9.3 It can be seen from Table 6.15 that there is very little capacity for additional convenience floor space within the City & County area in the short term and even by 2031 the capacity is less than 1,000 sq.m. Although the potential for additional net convenience floorspace currently would appear limited, this should be viewed within the context of the extent of convenience floorspace which has been

[10] See footnote 3. Generally newer retail outlets have higher turnover per sq.m. than older units.

implemented in recent years. Notwithstanding the low projected figures, there is likely to be a need for further modest neighbourhood scale convenience development in the short to medium term. Such additional development would be appropriate in the designated neighbourhood centres or zoned commercial lands in existing neighbourhood/district & town centres. Additional modest scale convenience floorspace (i.e. less than 1,500 sq.m. net) within existing designated district/neighbourhood & town centres would be appropriate in order to improve the range of retail offer and improve competition in the market.

6.9.4 The requirement for additional comparison floorspace within the City & County is significant over the period to 2026 and beyond to 2031. Table 6.15 indicates a requirement for an additional 55,100 sq. m. of comparison floorspace under Scenario 1 by 2026 and this increases to 61,400 sq. m. under Scenario 2. Of this approximately 30,000 sq.m. will be absorbed by the proposed mixed use development in the North Quays, and a further circa. 9,500 sq.m. in Michael Street shopping centre.

6.9.5 Table 6.15 above illustrates that there is unlikely to be any significant requirement for additional retail warehouse floorspace within the catchment up to 2031. This is not surprising having regard to the extent of this format of retail floorspace developed within both Waterford City, Dungarvan and Tramore over the last two decades.

6.9.6 It should be noted that the floorspace capacity figures outlined in Table 6.15 above should not be considered as upper limits, merely as indicative of the scale of new floorspace required to meet the needs of existing and future population and expenditure in the City & County. Additional new floorspace may be proposed and this could replace some existing outdated or poorly located retail floorspace. These figures should be seen as minimum rather than maximums. The key consideration is the location of new floorspace. The quantum only becomes a critical consideration where new convenience and comparison floorspace is proposed outside of the defined retail core of the city and the town centres of Dungarvan & Tramore and the issue of likely impact on the city/town centre as a whole arise.

CHAPTER 7

Policies, Action and Vision for the Future

7.1 INTRODUCTION

7.1.1 The purpose of this chapter is to set out key policies and actions in terms of the future development of retail facilities in Waterford City & County and to establish a clear vision for the future development of the City, Dungarvan & Tramore in retailing terms in accordance with the Core and Settlement Strategies.

7.1.2 The chapter examines the following issues:

- Retail Hierarchy
- Definition of Core Retail Area

- Distribution of Floorspace Requirements
- Specific Objectives for City & Town Centre Improvements
- Specific Objectives for District/Suburban Centres, Neighbourhood Centres, Retail Warehousing Development and Local Shops.
- Overall Conclusions
- Vision for the Future

7.2 RETAIL HIERARCHY

7.2.1 The principle of a hierarchy of retail centres informs the consideration of zoning for retail developments in development plans and is an essential component of a retail strategy.

7.2.2 The national retail hierarchy is set out in the Retail Planning Guidelines. It reflects both the settlement structure of the State and low residential densities in rural areas.

7.2.3 The guidelines identify four tiers of shopping provision within the national hierarchy. Waterford City is identified as a second tier centre in the context of the national hierarchy. It is identified that Waterford City, along with Cork, Limerick and Galway provide a range of high-order comparison shopping which is largely unmatched elsewhere. In this regard, the primacy of the City should be protected and promoted to ensure it retains its position in the national hierarchy and can act as a driver for regional growth and development. This needs to be acknowledged and recognised in the development plan policies covering the City & County and in the retail strategy.

The Role of the Development Plan in Defining the Retail Hierarchy

7.2.4 The formulation of the retail strategy for City & County should ensure that policies and proposals are consistent with the Retail Planning Guidelines but it should also be forward looking and provide a planning framework in assessing Waterford City & County within the national hierarchy both now and in the future.

7.2.5 The Development Plan should set out the hierarchy of centres and a strategy for the location of retail development. In particular, the guidelines state that development plans should indicate a range of centres, from city centre through to town centre, district/suburban centre to local centres and village centres where investment in new retail and other development will be promoted, and existing provision enhanced.

The Existing Retail Hierarchy of Waterford City & County

7.2.6 A key part of the Retail Strategy is to confirm the retail hierarchy. In determining the hierarchy the following principles were considered:

- The need to protect and enhance the importance of Waterford City as the principal urban centre in the county and region and also to protect the important more localised functions of the existing and planned district and neighbourhood centres in the suburbs of the City.
- The distribution of future retail floor space relates to the identified existing and future retail hierarchy in the City and County and should be appropriate to the scale and character of the centre.
- The distribution of future retail floor space should be linked to the future distribution of population growth.
- The principles of sustainability should be adhered to and future retailing should be concentrated as far as practicable in centres that are served by public transport.
- The need to facilitate competitiveness and innovation in the retail industry.

7.2.7 The current Retail Hierarchy within Waterford City is respectively:

BOX 7.1: WATERFORD CITY RETAIL HIERARCHY

First Tier- Waterford City Centre

The City Centre would be considered a first tier centre.

Second Tier – District Centres

The identified second tier District Centres are**:**

- Ardkeen/Farronshoneen
- Waterford Shopping Centre, Lisduggan
- Kilbarry, Tramore Road
- Ferrybank District Centre Abbeylands (in the administrative area of Kilkenny County Council)

Third Tier – **Neighbourhood Centres.**

The identified Neighbourhood Centres are:

- Cleaboy
- Kilcohan
- Ballinakill
- Ross Abbey SC, Rathculliheen, Ferrybank
- Ballybeg
- Hypermarket Morgan Street
- Carrickpherish
- Proposed Neighbourhood Centre at Knockboy

Fourth Tier - Local Shops.

7.2.8 The current Retail Hierarchy within the remainder of Waterford County is respectively:

County Retail Hierarchy	
Level/Retail Function	**Centre**
Level 1: County Town Centre	Dungarvan
Level 2: Sub County Town Centre	Tramore
Tier 1 Level 3: Town Centre	Dunmore East Lismore Cappoquin
Tier 2 Level 3: Town Centre	Kilmacthomas Portlaw Tallow
Level 4	All Other Local Service Centres
Level 5	All Settlement Nodes

Table 6.1 County Retail Hierarchy

7.2.9 Under the amalgamated City & County Council there is now a requirement to provide one integrated hierarchy for both city & county. Set out below is the proposed Waterford City & County Retail Hierarchy[11]

[11] This retail hierarchy should be kept under review and may be subject to change over the lifetime of the strategy.

Level/Function		Centre
Tier 1	**Metropolitan**	Waterford City Centre
Tier 2 (L1)	**Sub-Regional**	Dungarvan Town Centre
Tier 2 (L2)	**District/Suburban Centres**	Tramore Town Centre
	(In excess of 10,000 Population)	Ardkeen/Farronshoneen
		Waterford Shopping Centre, Lisduggan
		Kilbarry, Tramore Road, Inner Relief Road
		Ferrybank Centre Abbeylands
Tier 3	**Small Towns and Rural Areas**	Dunmore East
	(1,500 - 5000 Population)	Portlaw
		Lismore
		Tallow
		Kilmacthomas
		Cappoquin
Tier 4	**Local Shopping**	Cleaboy
		Kilcohan
		Ballinakill
		The Outer Ring Road Williamstown, Ballygunner Road (Opposite Meadowlands).
		Ballybeg
		Hypermarket Morgan Street
		Carrickpherish
Tier 5	**Other**	Local Shops in Waterford City
		Villages in Waterford County

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

"Town Centre: the term town centre is used to cover city, town and district centres which fulfil a function as a focus for both the community and public transport. It excludes retail parks, local centres and small parades of shops of purely local significance." (para 27 p. 8)

7.2.11 Waterford City is the principal urban centre in the county and region and forms the first tier within the retail hierarchy. The City exhibits a number of higher order retail, service and specialist functions not found elsewhere in the County. It has a good range of convenience and comparison shopping as well as cultural and entertainment facilities, restaurants, night clubs and pubs.

7.2.12 It has been identified however, that the City is underperforming in terms of comparison offer and that there is clearly a need to further reinforce the retail role and function of the City in order for it to retain expenditure, build on its NPF designated key role, develop its tourism role and ensure that it has significant retail attraction and offer to serve the needs not just of its County catchment but of its regional catchment. In order to sustain its position as a major regional centre and Regional City of scale, it should be the prime focus for future retail investment and development especially for non-bulky comparison goods including fashion and footwear.

Second Tier

7.2.13 The second tier centres are made up of two levels. Level 1 is Dungarvan Town. Given its history of the former 'county town' and given its location in west Waterford with a large catchment area, Dungarvan is an important market town which both has an important convenience shopping function, but also an relatively well developed comparison function. Therefore it will be important to protect and develop the retail function of the town centre of Dungarvan by both enhancing the environment and vitality of the town centre, and by closely controlling any inappropriate out of town retail developments.

7.2.14 Level 2 include Tramore Town and the existing district/suburban centres in the environs of the City. Tramore is located in the catchment of Waterford city but has greatly improved its convenience retail offering in recent years. Tramore is also an important tourism destination, and potential exists to further develop niche retail services to meeting this expanding tourism market and to the development of niche comparison shops with a small number of boutiques and bridal boutiques attracting a regional clientele and a growing artisan food retail sector. However, in relation to comparison shopping, given the proximity of Tramore to the city, Waterford will continue to meet the main comparison needs of the town.

7.2.15 District/suburban centres usually provide a more limited service role. They are defined in the Retail Planning Guidelines as follows:

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

7.2.16 The existing district/suburban centres in the environs of the City (with the exception of the Ferrybank centre in Co. Kilkenny which is constructed but currently vacant) are generally characterised by a large convenience anchor and a range of local retail services, ancillary specialist convenience outlets (i.e. butcher, greengrocer), community and social facilities and lower order comparison offer. Most of these centres serve a localised catchment and are primarily designed to serve weekly shopping needs.

7.2.17 Most of the district/suburban centres in the City area are modest in scale with limited development potential. The existing floorspace of each centre is presented in Table 7.1 below:

Table 7.1: Floorspace: Existing District/Suburban Centres in Waterford City

District Centre	Gross Floorspace (sq. m.)	Net Retail Sales Space (sq. m)
Kilbarry	6,317	5,054
Ardkeen/Farranshoneen	12,700	10,480
Lisduggan	8,458	6,766

Source: An Bord Pleanala Report: Ref: 31.215125

7.2.18 The unoccupied Ferrybank development has a gross floor area of over 34,000 sq. metres with a net retail floor area in excess of 7,000 sq. metres. The current Ferrybank/Belview Local Area Plan (2017) has designated Ferrybank SC as a District Centre as per the hierarchy set out in the Retail Planning Guidelines. This shopping centre has remained vacant since it was constructed over a decade ago, and it is highly questionable as to whether it will ever function as a shopping centre, given the planned development of the North Quays.

7.2.19 There have been previous planning permissions for the redevelopment of the Waterford Shopping Centre at Lisduggan, which would have permitted up to 11,029 sq. metres of development, but these have now expired. The general updating and renewal of Lisduggan would be welcomed considering the current state of the centre.

7.2.20 It is noted, that An Bord Pleanala has been restrictive in terms of the quantum and extent of development permitted in district/suburban centres in the suburbs of the City. Under file ref. 208088, the Board refused permission for the expansion of the centre at Farranshoneen for comparison development. The Lisduggan development was reduced in scale by the Board and the extent of comparison floorspace significantly reduced. In addition, stringent conditions ware attached preventing subsequent conversion of storage or mezzanine area to retail use and conversion of approved convenience or other retail floorspace to comparison use. It is evident that the City was at the time experiencing pressure to develop its district/suburban centres to accommodate a more significant range of convenience and comparison floorspace.

7.2.21 In this regard, it is recommended that the future development or redevelopment of the district/suburban centres in the City area is carefully monitored to ensure that the level and type of retail provision and their scale is appropriate in the context of the guidance set out in the Retail Planning Guidelines and in particular having regard to the limited scale and population of the City and the need to enhance the comparison role of the City Centre. District/suburban centres should comprise an anchor convenience store and modest range of complementary retail service development with limited comparison floorspace. Permitted comparison floorspace should be low and mid order in character. Proposals for such developments should be supported by a clear assessment as to whether any such development would have a material impact on Waterford City Centre.

Third Tier

7.2.22 Tier 3 includes the smaller towns of Dunmore East, Portlaw, Lismore, Tallow, Kilmacthomas and Cappoquin. These towns play important convenience shopping role for their respective local catchment areas, and in some cases, also provide some limited comparison retail (e.g. hardware or family run clothes shops) and these outlets requires to be maintained by supportive local planning policies.

Fourth Tier

7.2.23 Local and Neighbourhood Centres are considered to be within the fourth tier. These are defined in the Retail Planning Guidelines as follows:

7.2.24 *“Local Centre or Neighbourhood Centres: small groups of shops, typically comprising a newsagents, small supermarket/general store, sub-post office and other small shops of a local nature serving a small, localised catchment population.”*

7.2.25 There are a number of existing and planned neighbourhood centres in the City area. The quality and level of retail provision varies significantly between the centres. All however, provide an important shopping function for the local community and primarily serve day to day and top up shopping needs. In this regard, the role and function of such centres should be safeguarded in the future.

7.2.26 At present the suburbs are well served by neighbourhood facilities. In areas such as Knockboy, neighbourhood centres are either planned or permitted but not yet constructed. It is envisaged that there will be substantial new residential development in the City over the forthcoming plan period and it is envisaged that the majority of this planned population growth will be targeted to the existing and planned residential areas within the City. However, if new residential areas are developed, it would be appropriate for such areas to be served by a modest neighbourhood retail facility. Such a facility would typically be anchored by a convenience outlet of not more that 1,500 sq. metres net and associated ancillary retail services and facilities, coupled with community infrastructure.

7.2.27 Neighbourhood facilities may also be appropriate in large industrial or employment zones where they provide a valuable local shopping and retail facility for the workers and employees of such estates. Such neighbourhood facilities usually comprise a modest convenience store, sandwich shop/deli/coffee shop and perhaps other services such as dry cleaners, ATM etc.

Fifth Tier

7.2.28 Retail facilities in the fifth tier are typically small local shops serving villages and residential estates, shops attached to petrol filling stations etc which serve a local catchment area. Rural villages have the potential to develop a sustainable network of vibrant rural villages throughout the County that can drive social and community development, new commercial rural businesses. The local rural shop can be hub for postal services, tourism information, etc, local hall for doctor/ nurse visits, hair dressing and other services, school to be used for Garda liaison, community care etc’.

7.2.29 Therefore these important social and economic functions of village/local shops in serving local neighbourhoods, catering for the less-mobile, the elderly and those without a car are recognised in the Retail Planning Guidelines and will be supported and permitted to grow through this Strategy.

7.2.30 In addition, another sub-sector at this and neighbourhood level *(eg Ballybeg Greens),* is the casual trading sector, including farmers markets. These are often tourist attractions, and provide an alternative to normal retail formats. Farmers markets also present an opportunity to the local populations to sell their fresh produce directly to the customers , thus providing them with access to fresh locally grown, often organic, produce. Such markets can present a welcome addition to the retail options of urban areas and can compliment and augment the existing retail and non-retail uses.

7.3 DEFINITION OF THE CORE RETAIL AREA

7.3.1 The core shopping area of Waterford City is identified on Map 7.1. In determining the core area, the following was considered:

- ♦ The definition and policies of the existing development plan.
- ♦ The objectives of the retail strategy to maintain and enhance the vitality and viability of the city centre.
- ♦ The policies & objectives of the Planning Scheme for the North Quays SDZ. Below is Figure 6 taken from the Planning Scheme which illustrates the relationship between the North Quays and the city centre retail core.

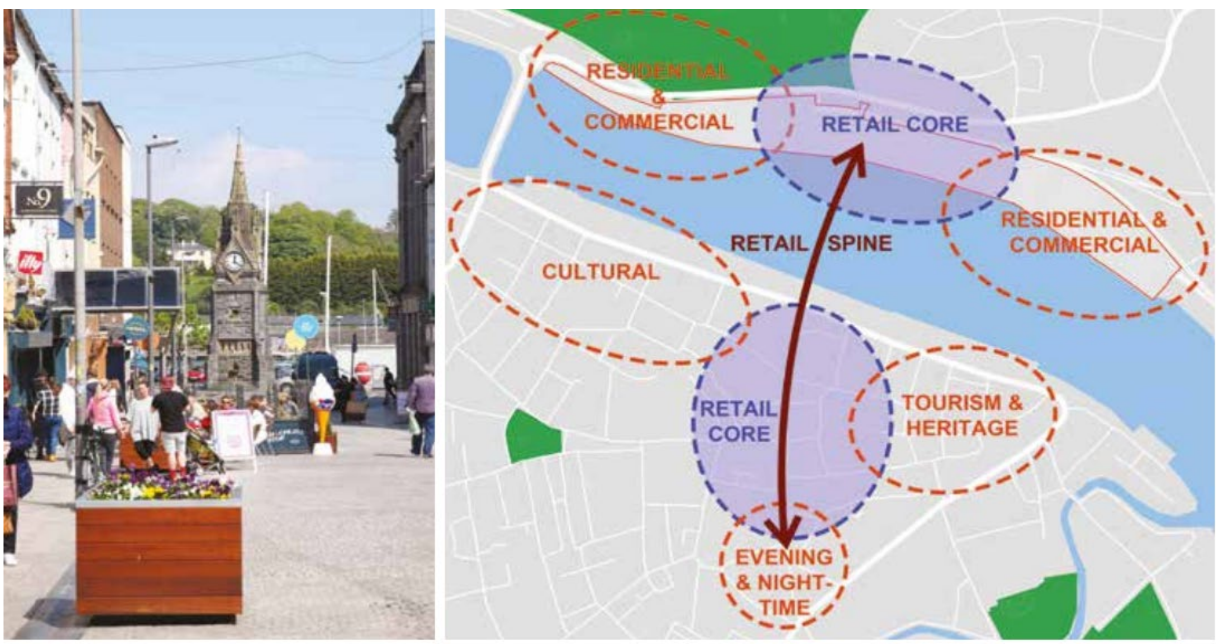


Figure 6: Existing & Proposed Land Use Quarters

Figure 7.1 North Quays SDZ Planning Scheme

7.3.2 The Core shopping area is normally characterised by a mix of factors including prime retail units, low vacancies, predominance of multiples and well established family run stores, few non retail uses and high pedestrianised foot flow. It is recognised that such core areas may expand to the immediately adjacent areas over the life time of this Strategy.

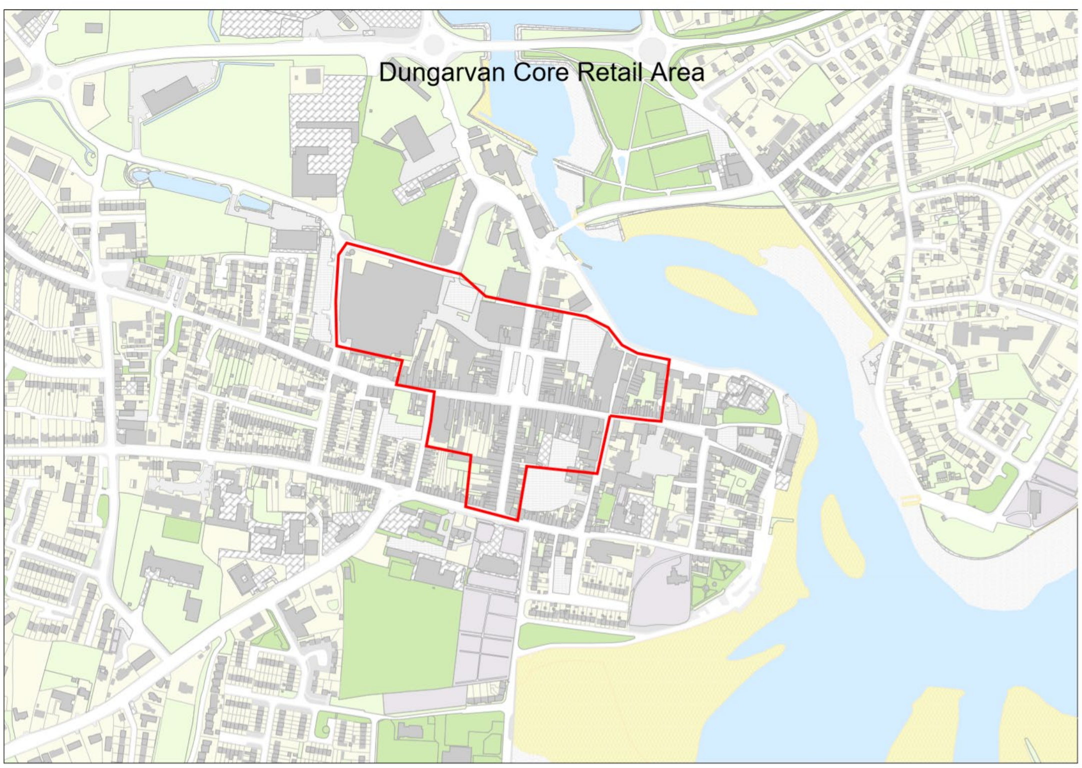
Figure 7.2 Waterford City Core Retail Area

7.3.3 Figure 7.2 above identifies the core retail area of Waterford City The area extends from the North Quays southwards and includes Barronstrand Street, Broad Street, John Roberts Square, Georges Street, Gladstone Street, Little Patrick Street, Patrick Street, Arundel Square, Conduit Lane, Exchange Street, Kiezer Street, Henrietta Street, New Street, Stephen Street and Michael Street and the blocks between these streets.

7.3.4 The core retail areas for both Dungarvan and Tramore have also been defined. In the case of Dungarvan the core area is shown on Figure 7.3. and incorporates the following Streets:

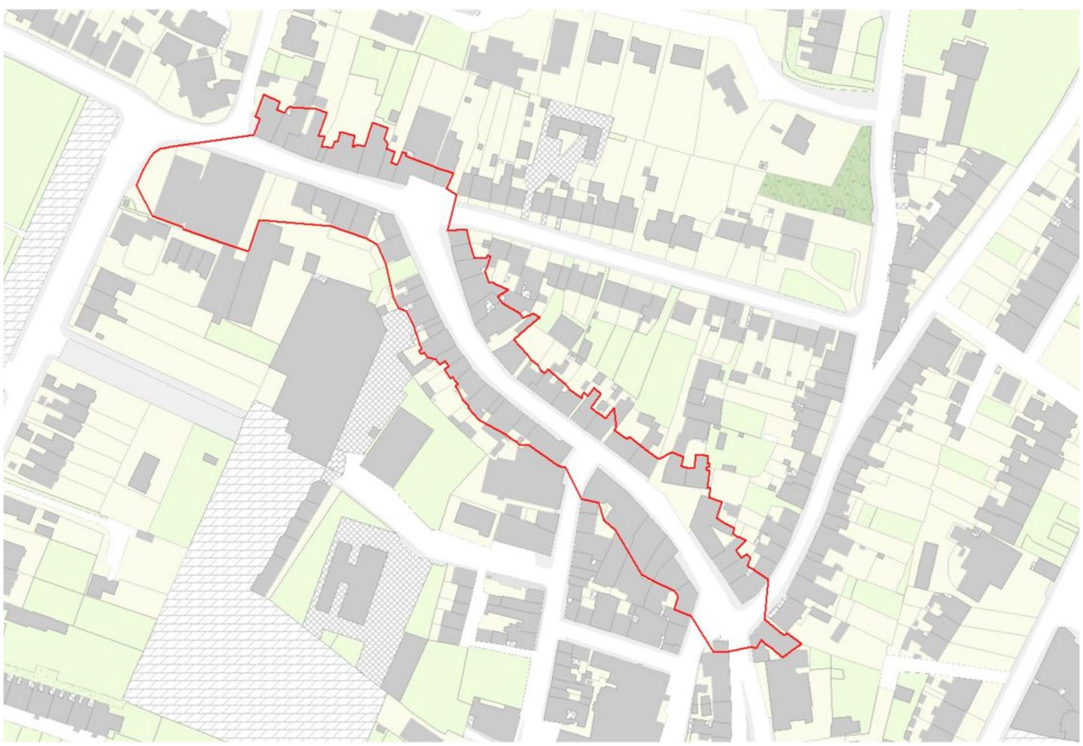
- Grattan Square,
- Parnell (Main) Street,
- High Street
- Mary Street.
- O'Connell Street

Figure 7.3 Dungarvan Core Retail Area



7.3.5 Tramore does not have as well defined core retail area, but the main spine (Main Street/Strand Street) from the lower to upper town is important in retail terms, as this is shown on Figure 7.4 below as Tramore's Core Retail Area.

Figure 7.4 Tramore Core Retail Area



7.4 DISTRIBUTION OF FLOORSPACE REQUIREMENTS

7.4.1 We have undertaken a capacity assessment in the previous section of this study. This is based on a number of forecasts and assumptions which may be subject to change.

7.4.2 We have estimated that it is only by 2031 that there will be need for additional convenience floorspace, and this will be quite modest in scale. Conversely there is an immediate undersupply of comparison retail floorspace of in the order of 30,000 sq.m. and this need is projected to grow to 55,000sq.m. by 2026 and 77,000 sq.m. by 2031. Under the higher growth scenario the equivalent 2026 figure is 61,000sq.m. and by 2031 85,000 sq.m. There is no requirement for additional retail warehouse floorspace within the catchment until after 2031.

7.4.3 It is recommended that new retail floorspace provision will reflect the existing and projected population in the City & County and the identified retail hierarchy. Additional demand for comparison retail floorspace should be promoted within the existing City Centre area, and in Dungarvan Town Centre. Convenience development would be appropriate as an anchor store both within the city centre of identified district/suburban centres within the city, or in Dungarvan or Tramore town centres or one of the other towns within the county. Additional comparison floorspace is essential in the city centre to ensuring that the City enhances its retail offer and attraction. Dungarvan town centre also has the capacity to accommodate some additional comparison shopping.

7.4.4 Notwithstanding the above retail projections which demonstrate the need for significant additional comparison floorspace, both in the short and medium term, there is relatively little in the pipeline, by way of extant planning permissions. Within the city there is an existing permission for circa. 10,000 sq.m. of retail floorspace, of which c.6,731 sq.m. is comparison floorspace, within the proposed Michael Street/New Street shopping centre. In addition, the North Quays SDZ Planning Scheme makes provision for circa 30,000 sq.m. of retail floorspace, and a planning application for a very large mixed use development, including this level of retail has recently be lodged with the Planning Authority. Even with these two developments there is potential to accommodate upwards of a further 15,000 sq.m. of comparison floorspace in the medium term. These figures should not be considered as upper limits, merely as indicative of the scale of new floorspace required to meet the needs of existing and future population and expenditure in the City & County. Additional new floorspace may be proposed and this could replace some existing outdated or poorly located retail floorspace. These figures should be seen as minimums rather than maximums. The key consideration is the location of new floorspace. The quantum only becomes a critical consideration where new comparison floorspace is proposed outside of the defined retail core of the city/town centre and the issue of likely impact on the city/town centre as a whole arises. Based on the NPF/RSES population projections and the policy focus to significantly enhance the critical mass of Waterford city, it is recommended that in the order of 85% of all future additional comparison floorspace in the county should be directed towards Waterford city centre.

7.4.5 Whilst the potential for additional convenience development may appear low, this should be viewed in the context of the extent of such floorspace recently implemented. There is likely to be a need for further modest neighbourhood scale convenience development over the life of the strategy in order to continue to improve retail offer, choice and competition. Such development is most appropriate within existing and planned neighbourhood and district/suburban centres or on appropriately zoned commercial land near to such centres or in other town or village centres, where modest scale additional convenience retail can help to maintain the vibrancy of the small town/village centre.

7.4.6 It is acknowledged that it may not always be possible to locate larger scale convenience retail provision (in excess of 1,000 sq. metres net) in the City or in new or proposed neighbourhood or district/suburban centres due to their large floor plate requirements. In this regard, appropriately zoned edge of centre locations may be considered for such development.

7.4.7 It should also be noted that some convenience operators now operate stores with a significant comparison element. Detailed consideration of the extent and scale of any such proposals should be given in the context of its potential impact on the city/town Centre. Such stores can sell clothing, footwear and household items which can impact negatively on the established city/town centre.

7.4.8 A number of potential opportunity sites for the development of high end comparison retailing have been identified in the City Centre Report[12] prepared by the Council in 2009 and every effort should be made to prioritise these sites for significant retail development. In this regard there should be a clear presumption against the development of high order comparison floorspace in the suburban areas of the City and in planned and existing district and neighbourhood centres.

7.4.9 In terms of retail warehouse development, both the City and County are well served in terms of bulky household provision. This is reflected in the low projected floorspace requirements for this category of retail floorspace, following the rapid grow in this sector in the early 2000's. It is recommended that future retail warehouse provision is met in existing and planned retail parks. Conditions should be imposed in such developments clearly restricting the sale of goods to bulky household items. Outside of Waterford city and the towns of Dungarvan & Tramore, retail warehousing is not appropriate.

Conclusions

7.4.10 In conclusion the distribution of future floorspace must have regard to the identified retail hierarchy. The redevelopment of key sites within the City Centre for retail development in order for the City to compete as a high level retail destination is of paramount importance. In this regard, the City Centre must be targeted and be the focus for higher order comparison retailing. This will entail restricting the level of comparison floorspace that can be accommodated in the suburbs. Comparison floorspace should also be directed towards Dungarvan town centre.

[12] Waterford City Centre Report , Waterford City Council, 2009

7.4.11 Convenience floorspace is also desirable in the City Centre, particularly as an anchor to a major retail development. However, there are opportunities for the development and expansion of convenience floorspace in the existing and planned district and neighbourhood shopping centres. Convenience development may also be appropriate on edge of centre sites on appropriately zoned commercial land, where such developments cannot be accommodated within existing centres due to limited floorspace potential or exclusivity clauses. In terms of retail warehousing, any future provision should be targeted to the planned and permitted retail parks in the City and in Dungarvan & Tramore.

7.5 SPECIFIC OBJECTIVES FOR WATERFORD CITY CENTRE

7.5.1 This section will summarise the general appropriate policies and actions to encourage the improvement of Waterford City Centre which follows on from the qualitative assessment in Section 5.

General Measures to Promote Waterford City Centre

7.5.2 Detailed below are a number of general policies and objectives that should be implemented to encourage and foster retail development in Waterford City. Whilst it is acknowledged that the development of retail facilities is largely dependant on market demand and retailer requirements, it is envisaged that the following general policies will help promote Waterford City as a vibrant and attractive area thus encouraging its growth, enhancement and development for retail, retail service, professional service and other complementary land uses.

<u>Promotion of Residential Development and Tourism and Educational Facilities in the City Centre</u>

- A key factor in the development of future retail facilities, particularly in some of the more peripheral and declining areas of the City Centre will be the development of a critical mass of population to support additional retail facilities. In this regard, and in the interests of sustainable development, residential development should be promoted and developed in the City. There are a number of peripheral and brownfield sites in the City that would be appropriate for residential development. This pattern of consolidation will ensure that Waterford City becomes an active living centre with the critical mass of population necessary to support a range of facilities and services. Such objectives is consistent with the new NPF policy objective of promoting compact urban development.
- In addition, third level facilities and student accommodation associated with Waterford IT, and its proposed transformation into a Technological University should be promoted in the City in order to attract third level students and the spending power associated with this sector. Therefore the retention of third level educational facilities within the city centre should be promoted.

- Retention of tourism expenditure and the development of appropriate synergistic tourism facilities and activities will be critical in the future development of Waterford City. The further promotion of cultural activities and events should be encouraged to draw visitors to the City. While much work has been done in this area, further product development and tourism offerings need to be developed to ensure that Waterford continues to grow as a tourist destination, with consequent growth in both bed spaces and length of stays. In this regard plans for a tourism offering on the North Quays including hotel and visitor/conference centre are very encouraging.
- This also links in with the need to develop further festivals and events so as to enhance the overall experience of vising the city centre, given the ever increasing importance of experiential retailing.
- As recommended in the City Core Report, consideration should be given to auditing the cities key educational, tourism, cultural and economic assets in order to assess how their contributions to the city centre economy can be strategically strengthened and maximised.

<u>Design and Shop Front Guidelines</u>

- Specific Design Guidelines for shop frontages and upper floors of buildings should be prepared and advice given to property owners and retailers on urban design. This should include the retention of existing traditional shop fronts and timber sash windows in upper floors.
- There should be a presumption against inappropriate shop front design and strict enforcement for unsympathetic and unauthorised signage and shop front fascia.
- Consideration should also be given to introducing a grants scheme and guidance on the painting of the upper floors on buildings within the core retail area.

<u>Business Improvements District Schemes</u>

- A feasibility study regarding the development of a city centre management initiative for the City in association with the Chamber of Commerce should be prepared. This may include the setting up of a city centre management committee and one or more 'BIDS' or Business Improvement Districts.
- A BIDS Scheme now operates in Dublin City Centre. The key objective of the Bids scheme is to develop and implement a series of new and additional initiatives designed to both further promote and improve the trading environment for the area within the BID boundary in which ratepayers operate their business. It is also designed to improve the image of Dublin City Centre from a tourist perspective and improve the quality of life for residents and workers in the BID area. The role of the local authority in this process is to facilitate schemes proposed by groups of ratepayers. They ensure the scheme is appropriate and collect the money on behalf of the BID company.

- In Dublin the scheme has been successful in offering services such as enhanced street cleaning and maintenance and a dedicated team of street ambassadors providing tourist information in the City Centre. BIDS provide a whole new impetus for businesses to work with their respective local authorities and local residents, allowing for innovation and acumen to benefit everyone in an area.

- In a Business Improvements District Scheme, a group of businesses are empowered, where a majority of those businesses agree, to raise a special contribution from all the businesses in the defined area to pay for the carrying out of complementary local services and improvements, within that defined area. The boundary of, and the range of local improvements to be carried out in the defined area of, a Business Improvements District Scheme are set out in a detailed business plan which is developed by the business community in association with the local authority.

City and Town Centres:

- Waterford City & County Council has set up a Waterford City Centre Management Group and two Town Centre Management Groups for Dungarvan and Tramore. The purpose and ambition of the City/Town Management Groups is for the continued growth and regeneration of their respective centres. The Management Groups are to be welcomed and provide a proactive partnership involving a range of key interests from the public and private sector which can focus on:

  - Providing strategic vision for the City and Town centres;
  - Preparing the City/Town Centre Management Plan;
  - Ongoing monitoring of the implementation of the Plan;
  - Engagement in an annual Health Check; and
  - Co-ordinating activities with the Visit Waterford Tourism Committee.

Special Contribution Scheme

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

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

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

Parking

- The quantity and cost of City Centre parking has been identified as a critical issue in the success of City Centres in many of the written submissions received. The lack of/cost of parking was also identified as an issue in the household and shopper's surveys undertaken (see Chapter 4). These surveys identified that shoppers to the city centre perceived that there was both a shortage of parking spaces and the costs were higher relative to other competing cities and towns. It is recommended that the Council would undertake a review of its parking charges and tariffs to ensure that the City retains its competitiveness with other retail centres, and to consider the modulation of parking rates during evenings and at weekends.

<u>Infill Development</u>

- Consideration should be given to the design and form of infill development within the secondary and peripheral retail streets in the City Centre. At these locations it can be difficult to attract viable retail development. In this regard it is recommended that the ground floor units of such infill City Centre developments (particularly those with an active street frontage) are designed with flexibility, for example higher floor to ceiling heights, to enable their easy conversion to retail or other commercial use if the demand so arises. This is to avoid the development of ground floor retail units which remain vacant with no active use which can be detrimental to the vitality and viability of the City Centre. The feasibility of developing alternatives such as live work units and professional services/own door offices in such infill schemes should also be investigated.

<u>Ongoing Environmental Improvements to the Public Realm</u>

- Waterford City has benefited greatly from an ongoing programme of environmental improvement, maintenance and enhancement over the past number of years. The attractiveness of John Roberts Square and the Viking Triangle is testament to the success of such ventures in providing a heart to the City. It is essential that such works extend further, particularly to the streets that radiate from the principal shopping streets and that the public realm is constantly maintained an enhanced through initiatives such as street cleaning, footpath repair, public seating, public art, derelict site maintenance and hard and soft landscaping. There is a need to improve the linkages between the Viking Triangle and the core retail district, and as and when the North Quays is redeveloped, to improve connections between the north and south quays.

<u>After Hours Activity</u>

- The development of the evening and night time economy is an important part of any City and it essential in ensuring the vitality and viability of City Centres particularly after hours. City Centres can become dead zones after normal retailing hours if there are no attractions to draw people there in the evening. In this regard the integration of retail, leisure, restaurants and bars is essential to the promotion of a vibrant City Centre. The obtaining of a Purple Flag is evidence that strides are being made in this direction, and this is seen as a model of good practice of how the hospitality sector have worked together and there is a need for the retail sector to follow suit and align their opening hours more closely with the hospitality sector to ensure a vibrancy during the evening times.

Specific Measures to Promote Waterford City Centre

Detailed Environmental Improvement Scheme

- Whilst the quality of the public realm in the City is generally good, and excellent in parts, there is room for improvement and a more consistent approach in the treatment of public spaces. In this regard, it is recommended that a comprehensive and detailed Environmental Improvement Scheme should be drawn up for the City Centre area and in particular for the streets radiating from John Roberts Square eventually extending to the entire City Centre area. This should include potential for further pedestrianised areas, high quality paving and street furniture, tree planting, flower baskets, sculpture, water features, lighting and so on, and all environmental improvements would be universally accessible. The scheme should extend to include all signposting and traffic light hardware. The scheme should also include recommendations and measures regarding a future maintenance regime.

- The continued refurbishment/upgrading of the main streets, laneways and thoroughfares in the City will enhance the vitality and attractiveness of the City's retail core by improving the shopping environment and encouraging greater pedestrian permeability. The report should identify areas where there is scope for better connectivity, legibility and linkages particularly from the Mall through the Viking Triangle into the City Centre.

Litter Management

- Poor litter management, street cleaning and bin emptying can detract from the City Centre and can have a significant adverse impact particularly from a tourist perspective. Results over recent years in the IBAL surveys have indicated that significant progress has been made in tackling litter, but further work is required.

City Quays

- The City Quays have significant development potential and their amenity and recreational value is not fully realised at present. While some improvements have been made in recent years with revised traffic management plans, there remains potential for further enhanced environmental improvements, better directional signage, traffic calming and improved pedestrian connections between the car parking areas and the shopping areas. In this regard, the feasibility of removing some of the surface car parking provision should be investigated further and in the interim, the existing parking areas would benefit from hard and soft landscaping to soften their visual impact.

- As detailed in the City Centre report the North Quays Planning Scheme, the connection between the North Quays and the City Centre needs to be further exploited and developed. In particular the provision of a new pedestrian/public transport bridge is essential to link the quays and to develop a gateway to the City

Centre in proximity to the clock tower to give a clear signal to visitors of the location of Waterford's City Centre.

Area of Special Planning Control

- It is noted in the qualitative section of the report, that the retail role of the prime retail pitch is being somewhat eroded by the introduction of non-retail uses and lower order comparison retailers. As noted this is undesirable as it can detract from the prime retail function of a street and dissuade prime city centre retailers from locating there.

- In this regard, consideration should be given to extending the Area of Special Planning Control, from that defined in the 2012 Retail Strategy to take in Michael Street, and to a wider area along the South City Quays. It would apply to all retail properties with a direct frontage to these streets. It is evident from the health checks that that as you travel southwards along Michael and John's Street these two streets appear to be in transition, with relatively high levels of vacancy. This may be partially due to uncertainty regarding the proposed Michael St./ New St. shopping centre proceeding, and also the transition into the night times uses concentrated around the Apple Market. It would be important that the area of special planning controls would be utilised to protect Michael Street, as far as the New Street junction, to retain the retail function on this street.

- The purpose of a Special Planning Control Scheme is to set out development management measures in order to achieve an appropriate mix and balance of uses in the prime retail areas. In particular, it addresses planning exemptions relating to changes within the same use classes including the de-exemption of specific uses such that a change of use to a particular type of shop will require permission. In this regard, this would allow the Council to prohibit undesirable retail uses in the prime retail streets including cash for gold shops, sex shops, mobile phone shops and discount shops. It would also enable the council to control a proliferation of retail services such as bookmakers, hair salons and internet cafes.

- The Special Planning Control Scheme could also make recommendations regarding advertising structures and de-exempt all signage and advertising structures both internal and external within the designated area and set out policies and objectives for the built environment and public realm.

- The de-exemption of the ability of a retailer to change the use of a shop from one retailer to another also gives the Council the power and discretion to permit uses for a temporary period of time. This may be appropriate for example where a shop unit has been vacant for some time, and rather than it becoming used by a non prime retail use on a long term lease, the de-exemption clause would allow the planning authority to restrict such a use for a temporary period e.g. 3 years, pending the improvement of the retail market.

- The primary purpose of the scheme is to highlight the importance of specific existing uses that are key components in the established character of the area and that act as magnets to the City and to control and prevent undesirable uses that may detract from these existing uses and character of the retail streets.

Development Management

- Proactive development management also needs to take place to ensure that the overdevelopment of particular uses such as takeaways does not occur in prime retail areas.

Development of Specific Derelict and Obsolete Sites

- Waterford Council have been successful in recent years in promoting initiatives to develop derelict and obsolete sites in the City for alternative use and/or environmental improvement and in some instances redevelopment to enhance city centre vibrancy through a mix of uses including residential.

- These initiatives are to be welcomed and it is recommended that this work continue with specific high profile derelict/obsolete sites, particularly on the secondary shopping streets such as O' Connell Street, being targeted for redevelopment and investment, in conjunction with the development of the planned cultural quarter.

- It is recommended therefore that the Council prepare a co-ordinated programme for building maintenance and development, as well as the identification of specific buildings and sites that need to be targeted immediately. The Council need to carry out regular inspections of the City Centre identifying vacant sites in need of redevelopment/renewal on an ongoing basis. The Council should also fully avail of the opportunities provided by the Vacant Sites Levy.

Improving Accessibility

- The City Centre Report identifies a number of specific measures that could improve accessibility to the City Centre. These recommendations are needed and are now only starting to be implemented. Significant progress has been made in some of these areas already, particularly through the implementation of the green routes. However further measures may include

    - Consider innovative signage along the south quays providing information on the City Centre and Viking Triangle.
    - Investigate park and ride strategy in peripheral areas of the City including the North Quays.
    - Offer an attractive, legible, informative, safe and traffic controlled environment, with easy access to sufficient off street car parking in order to provide a hassle free experience for motorists when entering the city for business or pleasure (underway through green routes proposals).
    - To review the existing inner city transport route with a view to facilitating the removal of non essential traffic from the central core and to provide more efficient public transport (green routes).

- Introduce a HGV/delivery strategy for the City Centre.
- Improved cycle paths and cycle parking provision in the City area.
- Removal of on-street car parking in areas to allow for improvements and upgrading of the public realm.
- In terms of car parking and access to the city centre, further car parking and public transport proposals will be derived from the Waterford Metropolitan Area Transport Strategy to be prepared under the auspices of the NTA in the coming years.

Development of Specific Opportunity City Centre Sites

- There are a number of sites in the City Centre area which have the capacity to provide appropriate opportunities for accommodating large retail developments. These sites include:

  Jenkin Lane Car Park/ Little Patrick Street/Georges Street - It is detailed that this is a key central block with a significant proportion in the control of the Council, while a number of other existing properties in this block contribute to the traditional main shopping areas of John Roberts Square/Georges Street, Barronstrand Street. It is noted that the redevelopment of this area would add to the richness and variety of the city centre retail core.

  Michael Street/New Street - This block is closely linked to the principal shopping streets and accommodates an extant permission for a major city centre mixed use and retail scheme. The redevelopment of this strategic site would contribute significantly to the enhancement of Waterford's retail attraction. The redevelopment of this block should be a priority.

- The revitalisation of the traditional city centre of Waterford is dependent upon the creation of new major retail attractions, combined with high quality car parking provision, integrated with the main streets, and associated improvements to the public realm. There are opportunities to achieve this in the City Centre although it is acknowledged that there are constraints due to the existing pattern of development and existing land ownership patterns. It is likely that it will be necessary for positive intervention from the local authority, including the use of compulsory purchase powers, to be relied on in order to secure the development of these sites.

- However, until the opportunities for City Centre major retail development have been exhausted, a very cautious approach should be taken in considering any applications for further retail floor space outside the City Centre retail core as defined in this study, other than for convenience and neighbourhood shopping. The development of further comparison retailing outside the traditional town centre area is likely to undermine the prospects for revitalising the City Centre and will hasten its decline.

- Notwithstanding the above, the development of edge of centre sites, particularly those identified below may be considered for comparison retail development where it can be clearly demonstrated that:

- the City Centre sites identified by the Council cannot be developed in the short term;
- that the development will not have an adverse impact on the vitality and viability of the City Centre;
- that the development will complement existing and proposed retail development in the city centre, create opportunities for commercial synergy and complement the existing retail structure of the City.

7.6 SPECIFIC OBJECTIVES FOR DISTRICT/SUBURBAN CENTRES, NEIGHBOURHOOD CENTRES, RETAIL WAREHOUSING AND LOCAL SHOPS

District/Suburban Centres

7.6.1 There are four district/suburban centres in Waterford City, namely Ardkeen/Farronshoneen, Lisduggan (Waterford SC), Hypercentre, and Kilbarry. A fifth district/suburban centre has been constructed on the edge of the City within the administrative area of Kilkenny County Council, but this remains vacant. Other than the latter, all are trading well and have good occupancy, with the exception of Ferrybank which is currently vacant.

7.6.2 The Council should continue to encourage the general upgrade and maintenance of these centres as appropriate and be proactive in discouraging any unauthorised development, illegal signage etc.

7.6.3 Lisduggan is a centre that is in need of redevelopment and rejuvenation and the Council should actively encourage the regeneration of this centre. It is noted that there is an extant permission for the centre, although it is uncertain when or if this will be implemented. In the interim, the Council should prepare an action brief for this site to encourage improvements in the public realm, external signage, public lighting, directional signage, hard and soft landscaping etc.

7.6.4 The development of comparison floorspace, particularly high order comparison should be strictly controlled and monitored in the district/suburban centres. There should be a presumption against the further development of comparison floorspace at Ferrybank. As defined in the Development Plan high order comparison goods are normally sold in Department stores, International and National multiples and specialist quality outlets and would include luxury items, designers clothes and footwear and household goods.

Neighbourhood Centres

7.6.5 The existing and planned neighbourhood centres in the City area provide an important local shopping role for residents and provide a range of essential day to day services and facilities.

7.6.6 The Council should encourage the continued development and upgrade of such centres and further neighbourhood shopping facilities should be planned for areas of residential expansion. Such facilities may also be appropriate in large employment/industrial zones to serve the day to day shopping needs of employees.

7.6.7 The existing neighbourhood centres at Cleaboy and Kilcohan would benefit from improvements to their public realm and it is recommended that the Council prepare an action brief for each of these centres to encourage improvements in the public realm, external signage, public lighting, hard and soft landscaping etc.

7.6.8 The proposed neighbourhood centre at Knockboy is not yet constructed. It is recommended that a neighbourhood centre at this location should be anchored by one medium sized convenience store not exceeding 1,500 sq. metres net retail floor area with a range of associated ancillary retail facilities, services and community facilities. Detailed consideration should be given to the design of such a facility to ensure its optimal integration with the surrounding community and that it contributes to the creation of a neighbourhood centre. In this regard, it is recommended that the Council prepare a detailed design brief for the future development of this site.

7.6.9 The existing neighbourhood centre at Ballybeg is poorly executed and remote from the existing residential community. It comprises a large Tesco store which is poorly integrated with other community facilities in the vicinity. It is noted that an Action Area Plan was previously prepared for the Ballybeg/Kilbarry area. It is recommended that this Plan be reviewed to investigate the opportunities for further neighbourhood centre and commercial development and the better integration of the existing Tesco development with the surrounding residential communities.

7.6.10 In Carrickpheirish, a small neighbourhood centre has been partly developed.

Retail Warehousing

7.6.11 Extensive areas of retail warehousing have been developed or have permission in the Waterford City Area and its environs, including the retail parks at Buttlerstown, Six Cross Roads, and the Cork Road.

7.6.12 The nature and type of goods sold from retail warehouse developments needs to be strictly controlled and monitored and limited to bulky household goods.

Local Shops

7.6.13 Local shops play an important role in the social life of the community. In this regard, the council should promote the provision of such facilities at appropriate locations. In particular, Ballybricken is a unique retailing area and acts effectively as an urban village within the City. In this regard it is recommended that the Development Plan for the area contains a specific objective to preserve Ballybricken as an important local shopping destination.

7.6.14 Local convenience outlets play a vital role in community self-sufficiency especially for those without access to public transport. Their function is also extremely important locally to meet 'top-up' convenience goods shopping needs (i.e. those products which need replacing between main food shopping trips) and to provide local services, including the provision of takeaway food. Towns, villages and rural areas also need to be supported in the development of new areas of economic activity, such as local value added enterprise activities, tourism, local enterprise, services and renewable energy to both complement the surviving elements of a restructured agri-business/natural resource sector and provide new employment opportunities.

7.6.15 From a policy perspective they are also important as they constitute a sustainable provision of retailing, removing the need to travel and also thereby reducing levels of congestion. It is unlikely that the scale of development in these centres will ever be such that it will undermine the continued vitality and viability of any higher order centres, or other centres at the same level in the retail hierarchy due to the distance between centres. Whilst it is unlikely that these centres will attract sufficient expenditure to support large scale provision of retail or comparison goods, they remain an important focus of the community and consequently their continued vitality and viability should be supported.

7.6.16 In the smaller rural centres of the County, a positive approach to promoting appropriate retail provision, in keeping with the scale and character of the town/ village, will be supported.

Retailing in Rural Areas

7.6.17 In accordance with the Retail Planning Guidelines, retailing in rural areas should generally be directed to existing settlements; development for this purpose in the countryside should be resisted. It is recognised, however, that there may be exceptional circumstances where the development of certain types of retail units in rural areas could be acceptable. The retail units in question could be:

• a retail unit which is ancillary to activities arising from farm diversification;

• a retail unit designed to serve tourist or recreational facilities, and secondary to the main use;

• a small scale retail unit attached to an existing or approved craft workshop retailing the product direct to the public; and/or

• a small scale retail unit designed to serve a dispersed rural community.

7.7 OVERALL CONCLUSIONS

7.7.1 Waterford City is the primary tier in the retail hierarchy and the most significant urban centre in the County. However, the retail role of the City is vulnerable and it is envisaged that its role and function as the major retail destination in the region will continue to erode unless there is significant investment and redevelopment in the prime city centre retail core in the short term.

7.7.2 The City is under increased threat from competing centres, not only in the immediate region, but also at a wider level from Kilkenny, Cork and Dublin. The accessibility of these latter destinations has been greatly enhanced by the completion of the M9 Motorway and the N25 upgrade. In this regard there is a significant threat that there may be further leakage of expenditure, and in particular comparison expenditure outside of the County.

7.7.3 The City is underperforming in its role as Gateway City and does not have the retail offer and attraction of other gateway Cities such as Cork Galway and Limerick. The City lacks significant retail attractions and needs to develop an enhanced range of new larger department variety stores coupled with high street fashion brands sited in key locations. It is envisaged that this type of development would act as a catalyst for further development and complement the range of independent operators currently represented in the City.

7.7.4 This report has identified that Waterford has an attractive and vibrant City Centre and many positive attractions. However, there is significant room for improvement and this section of the report recommends a suite of measures and actions that should be undertaken to continue to develop, enhance and reinforce the retail profile and function of Waterford City. There are many opportunities that the City can exploit in terms of regeneration of key brownfield sites within the City Core and the further development of the City Quays. Some edge of centre sites have also been identified for specific redevelopment opportunities.

7.7.5 Actions and measures also include specific positive interventions by the Council in terms of environmental improvements and further civic enhancement works, as well as more radical suggestions such as review of rate bases and car parking charges in the City Centre. Perhaps a more pragmatic and planned approach to incentivise occupancy is to identify a zone within the city/town within which rates will be controlled. This would marry well with a rent controlled strategy outlined above, thus bringing retailing and consumer life back to a specified zone within the town centre. The rates control must clearly specify the maximum “commencing rates” which can be applied on a premises and guarantee that rates will grow in line with the consumer price index within this zone over time. The agreed rates level would apply to all tenants, new and old, who trade within the controlled zone.

7.7.6 The provision by the Local Authority of a rent and rates controlled retail area, where only owner occupiers can trade from, may also assist, particularly with aspects relating to placemaking and distinctiveness. A case in point is Cork’s English Market which imposes a ceiling on rents and rates and insists on owner occupier tenants. However, it is noted that such a zone would have to be owned by the Local Authority, if not, some incentive would have to be provided to the private landlord.

7.7.7 These measures however will be necessary to protect and develop the role of the City Centre and ensure that it can compete effectively and develop into a retail destination commensurate with its status as a Gateway City.

7.7.8 In terms of the suburban areas of the City, it is clear that these are well served by a range of neighbourhood, district and retail warehouse development. Again measures and recommendations have been made in relation to these centres and in particular it is detailed that care should be taken to strictly control the extent of comparison floorspace that is developed in such centres in order to protect the primacy of Waterford City Centre. Some centres would benefit from environmental improvements whilst care must be taken with yet undeveloped centres to ensure that that they are appropriately linked to their surrounding residential area and provide a focus for the community.

7.7.9 Dungarvan, with its extensive rural hinterland, has a strong local market share and performing well in retailing terms, with relatively little vacancy levels within its core retail area. The town is well presented and has a thriving food and beverage sector which is contributing to the vibrancy of the town. There is potential to further expand and develop its tourism potential, and this in turn would support the development of some additional comparison floorspace in Dungarvan.

7.7.10 Tramore has seen a significant expansion in its convenience retail offering, and has advanced to the stage of largely meeting its own convenience demands of the resident population. Tramore has also greatly expanded its tourism offering in recent years, which has allowed the tourism season to extend into the shoulder months beyond the core summer season. While most of Tramore's demand for comparison shopping is to be found in Waterford city, the potential does exist for the development of niche comparison shops to complement a small number of boutiques and bridal boutiques attracting a regional clientele and a growing artisan food retail sector.

7.7.11 In relation to the smaller towns and villages across the county, the retail planning process must endeavour to maintain and grow their local distinctiveness. In order to support, enhance and diversify our rural towns and villages there is potential to support the delivery of an alternative and distinct offering to customers based on local distinctiveness. Rural villages have the potential to develop a sustainable network of vibrant rural villages throughout the County that can drive social and community development, new commercial rural businesses, and this should be supported through various Development Plan policy and objectives.

7.8 VISION FOR THE FUTURE

7.8.1 The future vision for Waterford City in retailing terms is:

The development of compact, accessible and vibrant City Centre that harnesses the full potential of its unique riverside setting, by developing its North & South Quays; that is a destination City in its own right; that offers a unique, distinctive and diverse range of independent, national and international retailers to serve the needs of its regional catchment and that the City is developed fully in accordance with the policies and objectives set out in the National Development Plan and Regional Spatial & Economic Strategy.

BOX 7.2: SUMMARY OF KEY ACTIONS AND POLICIES

City Centre

- Promote the development of specific opportunity City Centre sites and other identified edge of centre sites for appropriate city centre retail development.
- Identify specific derelict and obsolete sites for targeted renewal.
- Promote appropriate infill development with flexible ground floor uses.
- Promotion of residential development and tourism and educational facilities in the City Centre.
- Consideration of the evening and night-time economy.
- Preparation of detailed design guide regarding shop fronts.
- Promotion of the Living Over the Shop Initiative.
- Investigate feasibility of a Business Improvements District Scheme.
- Investigate the feasibility of preparing a Special Contribution Scheme for City Centre management initiatives and ongoing improvements to the public realm.
- Review parking tariffs in the City Centre.
- Promote ongoing Environmental Improvements to the Public Realm.
- Promote mixed uses schemes with an element of After Hours Activity to ensure vitality and viability in the City Centre in the evening.
- Prepare a detailed Environmental Improvement Scheme for the City Centre.
- Implement City Centre Litter Management Plan.
- Prepare Action Plan for the City Quays to include measures to improve public realm, car parking enhanced pedestrian connectivity, traffic calming etc.
- Consider the extension of the Area of Special Planning Control for the prime retail areas of the City.
- Promote effective development management to discourage over concentrations of particular types of activities e.g. fast food outlets in particular areas of the City.
- Improving accessibility to the City Centre through a range of measures, actions and initiatives.

Dungarvan & Tramore Town Centres & District/Suburban Centres

- Promote the ongoing upgrading and maintenance of Town Centres of Dungarvan & Tramore and of existing District/Suburban Centres in the city.
- Prepare Action Brief for Lisduggan for interim environmental improvement works pending its redevelopment.
- Discourage the development of higher order comparison floorspace in District/Suburban Centres to protect the primacy of the City Centre.

Neighbourhood Centres

- Encourage the continued development and upgrade of neighbourhood centres in the City.
- Promote neighbourhood facilities in areas targeted for residential expansion and in large employment/industrial zones to serve the day to day shopping needs of employees.
- Prepare action brief for Cleaboy and Kilcohan for ongoing environmental improvement works to the public realm.
- Prepare design brief for proposed Knockboy neighbourhood centre. Restrict the scale of convenience floorspace at this centre to 1,500 sq. metres net.
- Update Kilbarry/Ballybeg Action Area Plan to investigate the opportunities for further neighbourhood centre and commercial development and the better integration of the existing Tesco development with the surrounding residential communities.
- Restrict the extent of convenience floorspace at Carrickpheirish to 3,000 sq. metres net

Retail Warehousing

- Limited future retail warehouse development to be to be directed to the planned and existing retail parks in the City, Dungarvan and Tramore in line with the retail floorspace projections.

Local/Village Shops

- Promote the development of local shops in the towns and villages and ensure the preservation of Ballybricken as an important local retail destination.
- Support the delivery of an alternative and distinct offering to customers based on local distinctiveness in the county's smaller towns and villages.
- Promote the potential of rural villages to develop a sustainable network of vibrant rural villages throughout the County that can drive social and community development, new commercial rural businesses

Rural Areas

- Other than in exceptional circumstances, retailing in rural areas should generally be directed to existing settlements

CHAPTER 8

Criteria and Actions for Assessing Future Retail Development Proposals

8.1 INTRODUCTION

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

8.1 CRITERIA FOR ASSESSING FUTURE RETAIL DEVELOPMENT

8.1.1 All applications for significant retail development should be assessed against a range of criteria. These criteria are set out below. It should be noted that it is not appropriate to assess all applications for new retail development against all the criteria, particularly developments which are clearly in accordance with strategy in Section 8 and small scale developments (less than 1,000 sq. metres –net area.)

8.1.2 It is recommended that retail impact statements should not necessarily be required for developments less than 1,000 sq. metres – net area, unless they are located outside a city/town centre and is considered that they would have a material impact on the vitality and viability of an existing retail centre. Nor should retail impact statements be required for retail developments that are located within identified retail centres in a development plan including town centres, district/suburban centres and neighbourhood centres and are in accordance with the strategy.

8.1.3 Where the location of a proposed retail development submitted on a planning application has demonstrated to the satisfaction of the planning authority that it complies with the policies and objectives of a development plan and/or relevant retail strategy to support city and town centre, additional supporting background studies such as a demonstration of compliance with the sequential approach, below, or additional retail impact studies are not required.

8.1.4 However, where the location of a proposed retail development submitted on a planning application is not consistent with the policies and objectives of the development plan and/or relevant retail strategy to support the city and town centre, then that development proposal, must be subject to the Sequential Approach and its policy principles and order of priority set out below and any departure from these principles must be justified.

The Sequential Test

8.1.5 The order of priority for the sequential approach is to locate retail development in the city/town centre (and district/suburban centre if appropriate), and only to allow retail development in edge-of-centre or out-of-centre locations where all other options have been exhausted. Where retail development in an edge-of-centre site is being proposed, only where the applicant can demonstrate that there are no sites or potential sites including vacant units within a city or town centre or within a designated district/suburban centre that are (a) suitable (b) available and (c) viable, can that edge-of-centre site be considered.

8.1.6 Where retail development on an out-of-centre site is being proposed, only in exceptional circumstances where the applicant can demonstrate that there are no sites or potential sites either within the centre of a city, town or designated district/suburban centre or on the edge of the city/town or district/suburban centre that are (a) suitable (b) available and (c) viable, can that out-of-centre site be considered. In relation to whether sites can demonstrate suitability, availability and viability, the following should be taken into account in implementing the sequential approach.

8.1.7 a) **Suitability**: Matters to be considered include whether or not the development is consistent with development plan objectives, in particular zoning objectives, current land use activity in the vicinity of the site, size, capacity to accommodate development, traffic and transportation issues; and/or;

8.1.8 b) **Availability**: this criterion relates to site ownership, ease of assembly and timing. Sites must be genuinely available for development at the time that site acquisition/ assembly begins or within a reasonable time-frame; and/or;

8.1.9 c) **Viability**: the financial viability of a development is also a key consideration. The cost of site acquisition in the town centre may make a proposal unviable and force investors to look elsewhere in the area. Excessive development costs relative to values are also a consideration. For example, the requirement to deal with remediation for a brownfield site may have the potential to make a proposal unviable.

8.1.10 All applications for large retail developments in out of centre or edge of centre locations (in excess of 1,000 sq. metres – net area) should be subject to the sequential test. Where an application for a large comparison retail development (in excess of 1,000 sq. metres – net area) outside of the city/town centre is lodged to the planning authority, the applicant should demonstrate that all city/town centre options have been assessed and evaluated and that flexibility has been adopted by the retailer in regard to the retail format. The exception to the approach is retail warehouse development that are restricted to the sale of bulky household goods as it is identified in the Retail Planning Guidelines that such developments are better suited to peripheral locations on the edge of a town centre. Such development should be targeted to one of the 4 identified retail parks in the City (Butlerstown, Cork Road, Airport Road & Six Crossroads) and in Shandon & Dungarvan Business Parks.

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

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

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

- That there is a quantitative and qualitative need for the development.
- The contribution of the development towards the improvement of the city/town centre in terms of urban design.
- The contribution of the development towards site or area regeneration.
- The role of the development in improving the competitiveness of the city/town against other competing centres.
- Compliance with development plan policies and objectives.
- The development is easily accessibly by the elderly and disabled/mobility impaired.

8.2 CRITERIA FOR ASSESSING PARTICULAR TYPES OF DEVELOPMENT

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

Convenience Food Shopping

8.2.2 Where practicable, new convenience retail development should be located within the city centre or within a designated neighbourhood or district/suburban centre serving a large residential community within Waterford City and within the town centres in the County. Accessibility is the key to the success of such developments and such proposals should be accessible by all modes of transport particularly pedestrians and public transport. As large convenience shops attract customers carrying out large weekly shopping, it is important that such development should also be served by adequate car parking.

8.2.3 Edge of centre locations for such developments may be appropriate where there is limited room for expansion within an existing centre and where such development is located on appropriately zoned commercial lands. Out of centre sites for this type of retail development require careful assessment, subject to the sequential test assessment and their potential impact on nearby centres.

8.2.4 Within neighbourhood centres it is recommended that the size of an anchor convenience facility should not exceed 1,500 sq. metres net. Larger stores should be directed to planned and existing district/suburban centres and the city centre in Waterford city and to Dungarvan and Tramore.

8.2.5 In areas planned for residential expansion, the development of a neighbourhood centre anchored by a convenience supermarket is prudent. Modest convenience stores may also be appropriate in large industrial /employment zones where they anchor a neighbourhood centre serving the daily shopping needs of workers and employees.

District/Suburban Centres

8.2.6 It is unlikely that there will be a requirement for further district/suburban centre development in the City due to the population projections predicted in the Regional Spatial & Economic Strategy and the existing number and spatial distribution of such centres. Capacity is likely to be met in the vacant Ferrybank development and at Lisduggan which has significant potential for redevelopment and permission for expansion.

8.2.7 District/suburban shopping centres play an important role in the City retail offer, especially in the convenience provision within the City.

8.2.8 District/suburban centres should be of an appropriate scale to the City and its population and should be characterised by convenience retail, retail services, community and social facilities and a limited range of low and mid order comparison goods. There should be a clear presumption against the development of high order comparison retailing in district/suburban centres in Waterford due to their potential adverse impact on the City Centre.

Retail Warehouse Parks

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

8.2.10 As stated in the Retail Planning Guidelines, individual retail units should not be less than 700 sq. metres and not more than 6,000 sq. metres in size. These figures are gross floor area, including storage and garden centres. In respect of retail warehouse developments outside town centres, it is essential that the range of goods sold is restricted by planning condition to bulky household items such as DIY products, carpets, furniture, and electrical goods. Failure to do so may have a negative impact on the vitality and viability of the town centre area.

8.2.11 It is likely that there will be limited demand for further retail warehousing floorspace in Waterford city or county in the short term.

Factory Outlet Centres

8.2.12 It is stated in the Retail Planning Guidelines that the success of these centres depends on drawing customers and visitors from a wide catchment area, including tourists, and there may be implications for existing tourist centres and established town centres, even those some distance from the proposals. Criteria for assessing such development should therefore focus on whether such a development is located in a strategic location to capture expenditure from a very wide catchment area. Such development schemes should preferably be located within or immediately adjacent to an existing city/town centre. Out of centre sites are generally not appropriate for this type of development. Again, as such facilities are primarily geared towards the car borne customer, vehicular accessibility and adequate car parking are key factors. Consideration must also be give to the range and type of goods sold at such centres to ensure that they do not compete with the traditional town centre area.

Local/ Village Shops and Petrol Filling Stations

8.2.13 Local shops play an important role in providing for daily top up shopping and supporting the "10 minutes" neighbourhoods and are important as they are universally accessible to all members of the community. The development of such local shops should be encouraged in the residential areas of the City and in the smaller towns and villages throughout the County. Such developments should be designed to a high standard and be easily accessible to all sections of society.

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

8.2.15 In the smaller rural centres of the County, a positive approach to promoting appropriate retail provision, in keeping with the scale and character of the town/ village, will be supported.

8.2.16 The size of such retail units should not exceed 100 sq metres.

Retailing in Rural Areas

8.2.17 In accordance with the Retail Planning Guidelines, retailing in rural areas should generally be directed to existing settlements; development for this purpose in the countryside should be resisted, other than in exceptional circumstances where the development of certain types of retail units in rural areas could be acceptable (as outlined in Chapter 7).