WATERFORD CITY RETAIL STRATEGY

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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 Environment and Local Government (DoELG) in 2012 require Local Authorities to prepare retail strategies and policies for their areas and to incorporate these where appropriate into their development plan. 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 City Development Plan.

1.1.2 However, considering the increased demand for retail services that the City has experienced over the past number of years, and the challenge posed by the severe economic downturn nationally, the time is opportune to review the City Retail Strategy. It is particularly relevant in the context of the forthcoming review of the current Waterford City Development Plan 2007 – 2013. It is envisaged that the retail strategy will form an integral part of the City Council's overall vision for the development of Waterford City over the period of the plan.

1.1.3 It is also pertinent in light of the 2009 Draft Waterford City Centre Report. This report reviews 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 set a direction for the City Centre over the next number of years. The report in particular identifies the pressures that Waterford City is facing from competing centres and from the location of new retail formats outside the City Core. The formulation of a detailed retail strategy is therefore imperative in order to ensure that the vibrancy and vitality of Waterford City, a key Gateway in the region is maintained, enhanced and developed to its full potential. The strategy aims to better meet the City's shopping needs in a way that is efficient, equitable and sustainable as set down as a principle objective in the Retail Planning Guidelines.

1.2 WATERFORD CITY IN CONTEXT

1.2.1 Waterford City is the principal urban centre in the County and is a regional Gateway for the South East under the National Spatial Strategy. The role of the City has undergone significant change in recent years, with most traditional port activities re-locating to an alternative location at Belview.

1.2.2 As detailed in the Waterford City Centre Report, 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 been difficult. A major city centre scheme has been granted permission by the City Council known as the Newgate Development. However, construction has not commenced on this site and it is uncertain in the current economic climate what the future status of the site will be.

1.2.3 The City is experiencing increased pressures from outside influences and in particular nearby competing centres which have improved their retail offer and attraction dramatically over the past number of years. 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 vibrant 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 and commercial retail centre for the region. Whilst the City contains a good 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. The retail profile of the City is not commensurate with its status of a Gateway and significant City Centre. It is evident that the City has the potential to develop much further, if given the necessary range of actions, policy framework and economic conditions.

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 principle retail destination in the County and also its wider regional role as the key Gateway for the South East Region.

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 the national and regional planning guidelines;

(iii) Updated economic data;

(iv) Population growth based on the 2006 Census and predicted trends in the recently published Regional Planning Guidelines for the South East Region;

(v) The vitality and viability of the City Centre including a

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

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

1.4 APPROACH

1.4.1 The approach taken in the formation of the retail strategy, undertaken between March 2011 and May 2011 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, 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.

Survey: Existing floorspace data was updated. A household survey was undertaken to establish the existing shopping patterns in the City. A survey of 500 respondents was carried out. This provided clarity 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 and its catchment area. A shoppers survey provided a snap shot view of retailing in the City from the shoppers perspective. A total of 200 shoppers questionnaires were completed 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 the City and key retail centres and the suburban areas to assess their strengths and weaknesses in retail terms.

Analysis of Competing Centres: The main competing centres including Dublin, Cork, Kilkenny, Clonmel, Carlow, Tramore, Dungarvan, Carrick on Suir and Wexford were assessed in terms of their retail offer and attraction.

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

1.5 PREPARATION OF RETAIL STRATEGY

1.5.1 Following on from the analysis set out above, the strategy then sets out clear policies, actions and a vision for the future for Waterford City. 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.

1.5.2 The qualitative and quantitative analysis and other inputs as outlined above are fundamental in the capacity assessment of the City'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 2022.

1.5.3 The final component of the study was to determine the retail strategy for Waterford City to 2022. 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 the City Centre.
- 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.

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

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:	Assessment of Competing Centres
Chapter 7:	Quantitative Assessment
Chapter 8:	Policies, Action and Vision for the Future
Chapter 9:	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 spatial and sectoral policy documents which will guide the development of Waterford City and influence the future expansion of retail services in the City. The purpose of this chapter is to highlight the principal documents guiding the development of the City.

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

- National Spatial Strategy 2002-2020
- The National Development Plan 2007-2013
- Sustainable Development: A Strategy for Ireland
- Transport 21
- Retail Planning Guidelines for Local Authorities (2012)
- Smarter Travel – A Sustainable Transport Future – A New Transport Policy for Ireland 2009 – 2020

National Spatial Strategy 2002-2020

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

2.2.3 It is detailed in the NSS that the settlement strategy for the south eastern region is based on a hierarchy of urban centres which are made up of Gateways, Hubs, County Towns, Large Towns and District Towns. The NSS has identified Waterford City as a Gateway. It is stated in the strategy that:

"Strengthening the critical mass of the existing gateways in Cork, Limerick/Shannon, Galway and Waterford, to complement Dublin's successful national spatial role offers the most immediate prospects of establishing more balanced patterns of development over the next few years".

2.2.4 It is stated in the NSS that in the south east region, critical mass will be enhanced through Waterford performing as a gateway supported by Kilkenny and Wexford as hubs. It is detailed that these three will together form a nationally strategic growth triangle.

2.2.5 It is stated that Waterford, Kilkenny and Wexford will drive regional growth by providing a large and skilled population base, substantial capacity for additional residential and employment related functions and an improving transport network.

National Development Plan (2007 – 2013)

2.2.6 The National Development Plan covers the period from 2007-2013. The plan sets out a national development strategy in the areas of physical, social and community infrastructure.

2.2.7 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 Spatial Strategy is reflected in the implementation of the Plan;
- ♦ Protect, preserve and improve the natural environment;
- ♦ Ensure integrated, value for money governance.

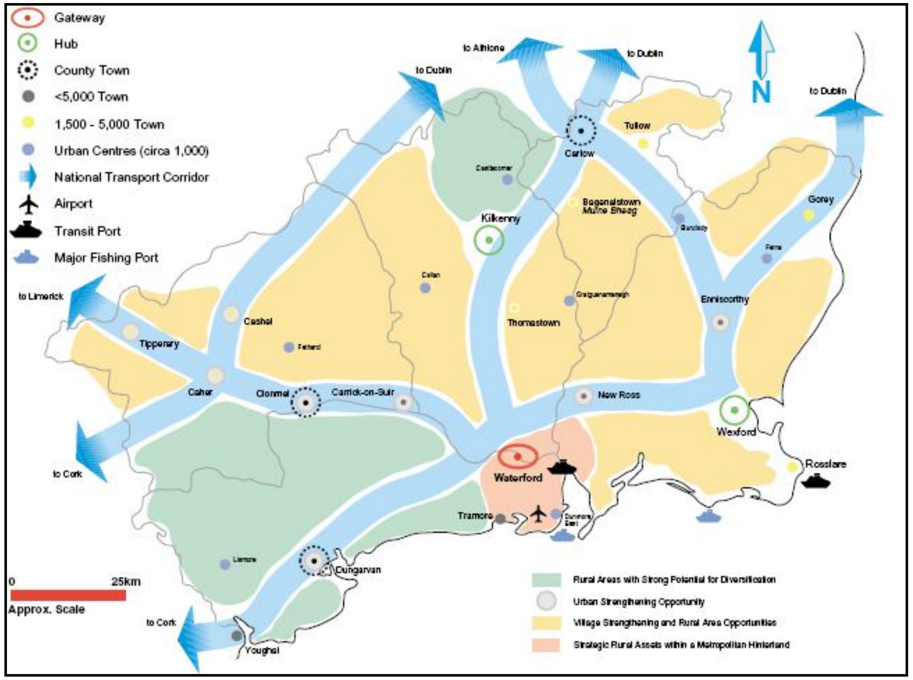


Figure 2.1: Extract from Map 8 of the NSS - South East Region

2.2.8 It is detailed that the plan will promote regional development with a particular focus on investment in the NSS Gateway Centres. It is outlined 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.

2.2.9 With regard to Waterford, it is detailed in the NDP that Waterford's population has grown steadily and the City is now home to over 50,000 people. It is stated that *"many of the challenges facing Waterford are similar to those that confront other gateway 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".* The NDP details that investment priorities for Waterford include:

- ♦ Completion by 2010 of the M9 Dublin – Waterford Road and N25 Bypass.
- ♦ Creation of effective bus based public transport network building on recent fleet investment through widespread bus prioritisation measures.
- ♦ Enhancement of road links to other gateways 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.

Sustainable Development: A Strategy for Ireland

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

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

Figure 2.2: Sustainable Development - A Strategy for Ireland

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

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

Transport 21

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

2.2.14 The South East of Ireland will be a major recipient of the transport investment provided for under Transport 21. Considerable funds will be invested into road, rail and regional airports. The national primary network will be substantially upgraded.

2.2.15 The programme contains a number of elements influencing the transportation network in Waterford City which are summarised below:

<u>N9 Dublin to Waterford:</u> substantial elements of the route have already been delivered. The section of the road between Waterford City Bypass and Knocktopher, a 23.5km stretch of high quality dual carriageway, officially opened in March 2010. The section of the road from Kilcullen to Carlow, a 28km stretch of motorway, officially opened in December 2009. The M9 motorway linking Dublin to Waterford is now fully complete. The N25 Waterford City Bypass opened in October 2009. The N9/N10 Carlow Bypass, which consists of 18.5km of high quality dual carriageway, was officially opened to traffic in May 2008. In 2006, the provision of a third lane in both directions along the N7 from Newlands Cross to Naas removed major bottlenecks and reduced journey times.

<u>N25 Rosslare to Waterford and Cork:</u> This route is intended to provide improved links to the strategically vital Port of Rosslare. It will provide links to the Atlantic Road Corridor at its western end and the N9 and N11 at its eastern end. A significant amount of work on this route is either completed, in hand or at an advanced planning stage.

<u>Traffic Management in Regional Cities:</u> This provision will fund the implementation of a range of traffic management, bus priority, car restraint, and park and ride measures in the Regional cities including Waterford. These include the construction of Green Routes, Quality Bus Corridors (QBCs), cycle paths, improved pedestrian facilities, traffic management support systems, and park and ride. The bulk of the expenditure is earmarked for the delivery of Green Routes or QBCs designed to reduce the travel time for passengers, improve bus performance and improve the quality of the public transport experience.

Provincial Buses: Funding of €23 million has been approved for the purchase of additional buses and coaches which have entered into service nationwide including Waterford. The introduction of these new buses has enabled the expansion of existing services and the introduction of new routes.

Regional Airports: Significant investment has taken place in the improvement of regional airports, including Waterford South East Regional Airport. The scheme retains a priority focus on improving safety and security at the regional airports.

Improved Intercity Rolling Stock: In 2005 CIE purchased additional high specification railcars to facilitate the expansion and extension of improvements in Intercity rail services on all of the InterCity routes, including Waterford. This will ensure the provision of improved service frequencies on a phased basis on all intercity routes.

Retail Planning Guidelines (2012)

2.2.16 The Retail Planning Guidelines (2012) were adopted by the Department of the Environment, Community and Local Government in April 2012 and replace the previous Retail Planning Guidelines (2005).

2.2.17 The aim of the Guidelines is to ensure that the planning system continues to play a key role in supporting competitiveness in the retail sector for the benefit of the consumer in accordance with proper planning and sustainable development.

2.2.18 The Guidelines emphasise that enhancing the vitality and viability of city and town centres in all their functions through sequential development is an overarching objective in retail planning. The Guidelines include a presumption against large out-of-town retail centres, in particular those adjacent or close to existing, new or planning national roads / motorways.

2.2.19 The Guidelines have five key policy objectives, namely:

- Ensuring that retail development is plan-led;
- Promoting city/town centre vitality through a sequential approach to development;
- Securing competitiveness in the retail sector by actively enabling good quality --development proposals to come forward in suitable locations;
- Facilitating a shift towards increased access to retailing by public transport, cycling and walking in accordance with the Smarter Travel Strategy; and
- Delivering quality urban design outcomes.

2.2.20 The Guidelines emphasise that in order to ensure proper planning and sustainable development, retail development and activity must follow the settlement hierarchy of the State, including the various Gateway and Hub town locations identified in the NSS 2002-2020, the Regional Planning Guidelines and the Core Strategies of Development Plans.

2.2.21 The Guidelines also provide specific guidance for the content and role of Development Plans. It is stated, *inter alia,* that:

- Development Plans must set out clear evidence based policies and objectives in relation to retailing in a discrete section of the Plan;
- Joint or multi-authority retail strategies, where required, will guide the preparation of retail policies and objectives in the relevant Development Plans;
- Where a joint or multi-authority retail strategy is not required, Development Plans should include a discrete section setting out general retail development objectives for other areas including rural areas;
- The need for any additional retail warehousing should be carefully assessed in view of the significant levels of recent provision and potential impacts on vitality and viability of city and town centres;

2.2.22 At a minimum, City and County Development Plans must:

- State the elements of their settlement hierarchy in line with the relevant regional planning guidelines and their core strategy;
- Outline the level and form of retailing activity appropriate to the various components of the settlement hierarchy in that core

strategy;
- Define, by way of a map, the boundaries of the core shopping areas of city and town centres and also location of any district centres;
- Include a broad assessment (square metres) of the requirement for additional retail floorspace only for those plans in the areas covered by a joint or multi-authority retail strategy;
- Set out strategic guidance on the location and scale of retail development to support the settlement hierarchy, including where appropriate identifying opportunity sites which are suitable and available and which match the future retailing needs of the area;
- Identify sites which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area;
- Include objectives to support action initiatives in city and town centres; such as
  - Mobility management measures - that both improve accessibility of retail areas while aiming to develop a pedestrian and cyclist friendly urban environment and vibrant street life;
  - Public realm interventions - aimed at improving the retailing experience through high quality civic design, provision of attractive street furnishing, lighting and effective street cleaning/business improvement district type initiatives; and
- Identify relevant development management criteria for the assessment of retail developments in accordance with these guidelines.

2.2.23 Waterford city is identified as a Tier 2 centre. The following retail floorspace caps apply to Waterford city:

- 3,500 sq. m. net cap on convenience retail floorspace;
- 6,000 sq. m. net cap on retail warehouse floorspace;

2.2.24 It is also noted in the Guidelines that the need for any additional retail warehousing should be carefully assessed in view of the significant levels of recent provision and potential impacts on vitality and viability of city and town centres.

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

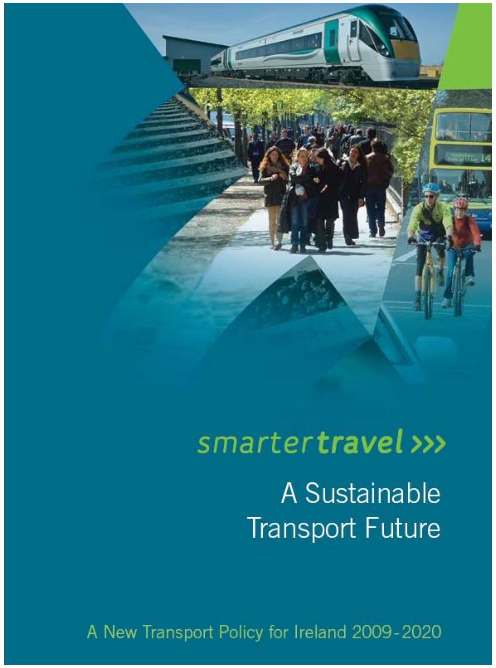


Figure 2.3: Smarter Travel

2.2.25 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.

Conclusions

2.2.26 A review of National Policy identifies that Waterford City is a designated Gateway in the region and thus is to be the focus of continued 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 has the necessary attractions and facilities for its residents. It is a critical element in ensuring that the city is an attractive place to live, work and invest in and to maintain its 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

South East Regional Planning Guidelines 2010 - 2022

2.3.1 The South-East Region covers Waterford City and counties Carlow, Kilkenny, South Tipperary, Waterford and Wexford. The Regional Planning Guidelines provide a strategic planning framework for the South-East Region with the objective of implementing the National Spatial Strategy at regional level and achieving balanced regional development. The RPGs incorporate high level policies which inform and advise local authorities in the preparation and review of their respective Development Plan.

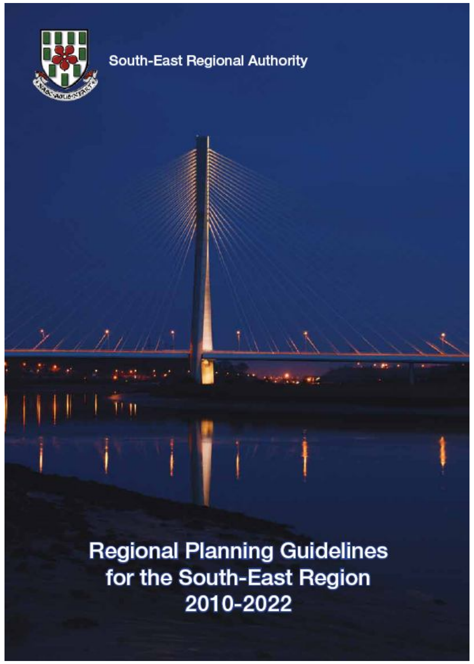


Figure 2.4: Regional Planning Guidelines for the South-East Region

2.3.2 It is outlined in the guidelines that the population in the South-East in 2008 was 487,800 (11.0% of the national population). In the 1991 to 1996 period population growth in the region was only at 77% of the national rate, but picked up substantially in subsequent years to grow at marginally above the national rate from 2002 to 2006 (105.0% of the national rate).

2.3.3 The guidelines acknowledge that there has been considerable infrastructural investment in the region over the past number of years. In relation to Waterford City, some of the most notable have been the completion of the M9 motorway, the N25 Waterford City By-Pass and the Outer Ring Road. Other important developments include the carrying out of significant urban renewal and conservation projects in the city centre, refurbishment of the Theatre Royal and Garter Lane Arts Centre and the House of Waterford Crystal Visitor Centre.

2.3.4 In terms of population profile, the guidelines detail that the population of the South-East Region increased from 423,616 to 460,838 persons between 2002 and 2006, an increase of 37,222 people or 8.8%. In 2008, the population of the region was estimated to be 487,800. The population of Waterford City and Environs grew by 2,477 people between 2002 and 2006. However, this rate of growth was less than the average for larger urban areas across the region. Significant population increases were recorded in towns and rural areas surrounding Waterford City.

Table 2.1: Population Targets 2010 - 2022

Area	2006	2010	2016	2022
Waterford City	45,748	48,500	51,000	55,000
Waterford City & Environs	49,213	52,500	56,500	62,500

2.3.5 In terms of disposable income, per capita disposable incomes in the South-East are below those recorded by many counties located within adjoining regions. The guidelines identify a number of key economic development issues including the need to create vibrant city and town centres with high levels of enterprise activity.

2.3.6 It is envisaged that by 2022 the South-East will be recognised as a distinct and cohesive region that is prosperous and competitive, where the benefits of economic success are shared equitably throughout the region and throughout society and which offers a good quality of life in an environment rich in heritage and landscape value.

2.3.7 In this regard it is an objective of the Guidelines to support the development of the Gateway and combine the strengths of the cities and towns in the region, as envisaged in the National Spatial Strategy, to achieve sufficient critical mass to compete with larger urban centres in other regions by:

- Planning for a sustainable regional population of 580,500 by the year 2022.
- Supporting the development and growth of the Waterford City Gateway as the Driver for the region.
- Developing the main urban settlements as attractive places for people to live in and want to move to, where efficient public transport and quality public services and a high quality environment make them attractive places to live, to work in and do business in. This is the key to building critical mass and achieving population targets.
- Promoting strategies to prioritise urban regeneration in order to improve and revitalise cities, towns and neighbourhoods and support local economies.

2.3.8 The Settlement Strategy sets out the target population for the region and for each of the main settlements in the region. It is envisaged that by 2022, the population of the City will be 55,000.

2.3.9 In terms of retail development, it is stated that the Regional Authority would encourage preparation of a Joint Retail Strategy for Waterford and its environs. A Joint Retail Planning Strategy's primary purpose is to support the statutory plan making process and the development management process to ensure that adequate provision is made for new retail development in the most appropriate locations and to ensure that excessive provision of retail space is avoided.

2.3.10 It is detailed that the strategy should provide guidance on the need for new retail floor space and where, in accordance with the principles of sustainable planning, it should be allocated.

2.3.11 The central key objective of the Retail Strategy is to support the 'city centre first' approach in the context of the retail hierarchy and to promote the vitality and viability of existing centres.

2.3.12 It is further outlined that the retail sector contributes significantly to regional employment figures and to the economic development of the region. The Regional Authority supports the continued growth of the sector and development of retail businesses (including retail warehousing) while protecting the retail function of the principal shopping streets of the cities and towns. It is stated that new retail development should satisfy 'Smarter Travel' criteria in terms of its location and accessibility by sustainable modes of travel.

2.3.13 The guidelines also provide specific guidance regarding city and town centre development. It is detailed that people are often attracted to cities and larger towns, where there is a vibrant social and cultural life, coupled with broad employment opportunities and a wide range of services including education, healthcare and childcare facilities, transport systems and ready access to entertainment and amenity facilities.

2.3.14 The elements that contribute to the attractiveness of such places include:

- 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.

2.3.15 The guidelines conclude that if balanced regional development is to work, the spatial structure must be supported by policies aimed at enhancing the attractiveness of areas for people to ensure that there is a combination of social and cultural facilities for both people and business. In the case of Waterford City, proposals to consolidate the City around the River Suir with an emphasis on the possibilities for developing the city quays present exciting opportunities which should be supported by local planning authorities.

2.3.16 It is also clearly acknowledged that the retail sector contributes significantly to the growth in employment and to the economic growth of the region. There is a need to ensure that the development of the retail sector serves to protect and enhance the vibrancy and vitality of the city and town centres. This will help address the leakage of retail spending to larger centres outside the region such as Cork City, Limerick City, Dublin City and the larger sub-urban centres in the Greater Dublin Area.

Conclusions

2.3.17 The policies of the Regional Planning Guidelines serve to channel population growth and development into a hierarchy of settlements. Whilst the 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 guidelines as is the need to create dynamic, vibrant and high quality 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 gateway 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 guidelines.

2.4 CITY AND LOCAL POLICY

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

- Waterford City Development Plan 2007 – 2013
- Waterford Planning and Land Use Transportation Study (PLUTS) 2004-2020
- Waterford City Centre Report 2009 (Draft)
- Waterford North Quays Framework Plan

Waterford City Development Plan 2007 – 2013

2.4.2 The City Development Plan sets out Waterford City Council's policies and objectives for the development of the City from 2007 to 2013. 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 Plan sets out the current retail hierarchy for the City. This is shown at Box 2.1

BOX 2.1: WATERFORD CITY DEVELOPMENT PLAN RETAIL HIERARCHY

1. The City Centre;

2. The District Centres at:
   - Ardkeen/Farronshoneen;
   - Lisduggan;
   - The Inner Relief Road/Tramore Road;
   - Abbeylands in the northern environs in County Kilkenny.

3. Neighbourhood centres at:
   - Cleaboy
   - Kilcohan
   - Ballinakill
   - A proposed site at Knockboy
   - A proposed site at Carrickphierish
   - A proposed site at Ballybeg

   It is detailed in the plan that at the neighbourhood centre at Carrickphierish, the anchor supermarkets shall be medium sized, in the region of 1,600 net sq. metres and shall only be permitted within the designated neighbour-hood centre.

4. Corner shops;

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 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 development plan recognises that Lisduggan Shopping Centre requires redevelopment which in addition to its convenience offer can include provision for low to middle order comparison goods of up to 1,460 sq. metres.

2.4.9 It is the policy of the plan to:

- Acknowledge the role of the District Centres in meeting local needs primarily for convenience shopping with a limited range of comparison shopping to service local need.
- To restrict the development of large scale retail developments to the City Centre and District Centres.
- To adopt the sequential approach to retail development proposals.

2.4.10 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.

2.4.11 With regard to retail warehousing, the plan anticipates that there will be an expansion in expenditure in categories of goods that may not be readily accommodated within the central shopping areas and thus it is proposed to make provision for the development of retail parks subject to strict controls on the volume of floorspace to be provided and the range of goods to be sold. Three sites are specifically designated for the development of retail parks including a site at Six Cross Roads, a site at the Airport Road and a site on the Cork Road. It is outlined that in addition to retail warehouse developments, these sites are also capable of accommodating mixed uses, providing for the creation of an enterprise zone and facilitating opportunities for employment creation. The plan sets out specific standards and criteria that retail warehouse developments must comply with.

2.4.12 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.

2.4.13 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..

2.4.14 In terms of convenience floorspace, the plan details that the development of the existing District 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.

2.4.15 The retail strategy 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.

2.4.16 The development plan identifies a number of precincts within the City area. 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

2.4.17 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.

2.4.18 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.

2.4.19 Key elements of the PLUTS are:

- Provision for a population increase of almost 30,000 people (pr 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.

2.4.20 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.

2.4.21 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.

2.4.22 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

2.4.23 The purpose of this report is 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 next number of years. In particular the report identifies the centres strengths and weaknesses and identifies further development opportunities as well as gauging what is required to improve its shopping attraction. An overall aim of the report is 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.

2.4.24 The report details that notwithstanding its gateway designation, the City does not dominate its region like 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 is also identified that retailing in the city has 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 is 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 is highlighted that such developments are likely to act as catalysts for further development.

2.4.25 The report highlights the recent infrastructural improvements in the City and whilst it is acknowledged that these key regional infrastructural projects expand the catchment area of the City, it also facilitates 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 states *"the importance of improving the City Centre's attraction through upgrading the quality of our retail offer cannot be over emphasised."*

2.4.26 The report includes a detailed City Centre retail analysis. It is 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 notes that in the absence of the proposed Newgate development (a major new City Centre proposal permitted but not yet 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 is for the City to be in a position to offer larger floor plates to both existing and prospective retail tenants. The study notes 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.

2.4.27 In terms of accessibility, the report notes 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 details that the South City Quays parking provision is considered a significant advantage for the existing retail core, although there is scope to increase the car parking there . In this regard, measures such as traffic calming along the quays are identified as a means to further enhance the attraction of the retail core to major retailers. The report includes 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

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

2.4.29 The report outlines 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

2.4.30 The report identifies 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.

Affirming a regional role: 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.

2.4.31 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.

2.4.32 The report goes on to identify a number of opportunity sites for redevelopment in the City. It is detailed that the basis 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 is 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

2.4.33 The study concludes by identifying that the current balance between the City Centre of Waterford and retail decentralisation is somewhat uneasy and potentially volatile. It is outlined that the level of decentralisation to key nodes in the suburbs needs 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 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.

2.4.34 The report clearly identifies that the City has a marked representation of MSU retailers and that the City Centre's supply of retail floorspace is not meeting the demands of the retail sector. It is noted that this is a precarious situation as there is a danger that new retailers are shifting their locational preferences to out of centre and other locations.

2.4.35 It is detailed that the City requires 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 will consolidate the retail core. However, in order to bring such potential to fruition, site assembly must be resolved.

2.4.36 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.

Waterford Urban Design Framework Plan North Quays 2008

2.4.37 The framework plan sets out a broad vision for the development of the North Quays and sets out development concepts 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.

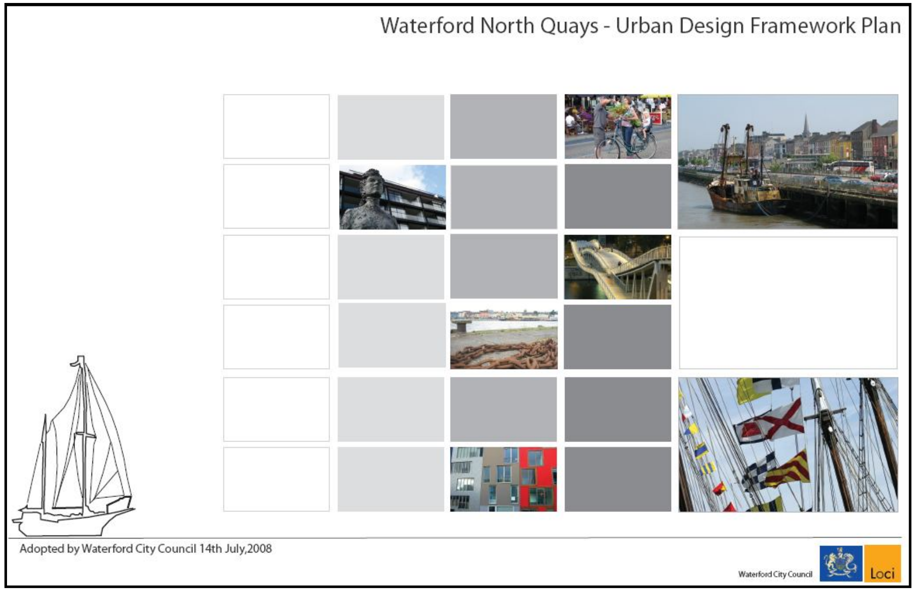


Figure 2.5: Waterford Urban Design Framework Plan North Quays 2008

2.4.38 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 plan proposes a new bridge which will provide easy access to the existing bus station.

Conclusions

2.4.39 A review of local and City planning policy reveals that Waterford, although the principle gateway 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 in the region and is also experiencing pressure from retailers seeking larger and flexible retail formats in the suburban areas of the City. There is a clear presumption in the City Plan to inhibit the spread of high order retailing in the suburbs. 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.

CHAPTER 3

Economic Context and Current Trends in Retailing

3.1 INTRODUCTION

3.1.1 In setting out the retail strategy for the City, it is important to assess 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 2006 Census of Population and the Retail Sales Index, ESRI publications such as Quarterly Economic Commentary, the National Spatial Strategy and the Regional Planning Guidelines for the South East Region 2010 – 2022. 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.

3.2 NATIONAL CONTEXT

3.2.1 The Irish economy experienced an unprecedented period of growth since the early 1990's. According to the ESRI[1], unprecedented economic growth saw the level of Irish real GDP double in size over the course of a little more than a decade.

3.2.2 However, the pace of economic growth began to decelerate in the second half of 2007. In 2008, output fell for the first time since 1983, and the recession deepened in 2009. Ireland's economic difficulties have been compounded by the global difficulties in financial markets which commenced in 2007.

3.2.3 With the decline in economic growth, came a decline in employment. From a peak of 2.1 million persons employed in 2007, an increase of 75% from 1990 and averaging a low unemployment rate of 4.5% in 2007, unemployment as of May 2011 now stands at 440,947 persons (14.8%), representing an annual increase of 3,025 (0.7%) over the year, comparing with an increase of 5,741 (1.3%) in the year to January 2011[2].

3.2.4 In addition to the global economic downturn, the ESRI attributes the national downturn to the inflated house prices witnessed during the growth period, stating that:

"House prices increased substantially in the late 1990's and in the first half of this decade, and investment in housing as a percentage of GNP rose from around 6 per cent in 1996 to almost 15 per cent in 2006. Given this weight of house building in total economic activity, the slowdown in the construction sector has acted as a significant drag on overall economic growth". [1]

3.2.5 According to the ESRI, the current downturn has seen the public finances move into deficit at an alarming rate, with the General Government Deficit reaching 14% of GDP in 2009. The ESRI Quarterly Economic Commentary of Winter 2010 estimates that the general government deficit will be 9.6% of the GDP in 2011 and 7.8% in 2012.

3.2.6 As would be expected, retail sales have been affected by the downturn. The most recent CSO Retail Sales Index indicates that in March 2011 retail sales volumes, excluding the motor trade and bars, declined by 2.1% year-on-year in volume terms. However, clothing, footwear and textiles is a more healthy business sector than others displaying a 2.8% annual percentage growth year-on year in volume terms. The retail sales for food business was static year on year in volume terms.

3.2.7 The ESRI report 'Recovery Scenarios for Ireland: An Update'[3] examines both a 'high growth scenario' and a 'low growth' scenario for Ireland. These scenarios are described by the ESRI in summary as follows:

". . . there could be a vigorous recovery over the period 2012 to 2015, as set out in our High Growth scenario. Such a recovery would gradually move the economy back towards full employment. However, even with the cuts of €7.5 billion planned for the period 2011-14, the government deficit could still be 2 per cent of GDP in 2015.

On the other hand, the Irish economy could record lower rates of growth over the medium-term for a number of reasons: for example, because the export sector had suffered long-term damage or because a continuing high interest premium seriously affected future investment or because structural unemployment remained high due to a failure of labour market policy. While under such a Low Growth scenario there would still be

1. ESRI Current Trends, http://www.esri.ie/irish_economy/
2. CSO Live Register Figures May 2011
3. ESRI, Recovery Scenarios for Ireland: An Update', 21st July 2010

significant growth over the period 2012-15, it would not be enough to return the economy to full employment and, in 2015, the government deficit would still be around 4 per cent of GDP, even after the planned four years of cuts".

3.2.8 The latest ESRI Quarterly Economic Commentary (Winter 2010) estimates that both GNP and GDP are expected to grow for the first time since 2007, although the rates are expected to be slow. The ESRI further describe that:

"For 2011, growth in GNP and GDP are expected to be accompanied by continued employment reductions. The rate of unemployment is expected to average 13 ½ per cent in 2011 and 13 per cent in 2012. Net outward migration is forecast to be 100,000 over the two year period April 2010 to April 2012".

3.3 REGIONAL CONTEXT

3.3.1 Waterford is located in the South-East region. Table 3.1 opposite indicates that the south-east region, according to the 2006 Census, accounts for 10.8% of the population of Ireland. Waterford (City and County) contributes 23.6% of the population of the south-east region, second only to Wexford with 28.7%. Waterford City contributes 10.1% of the population of the south-east region.

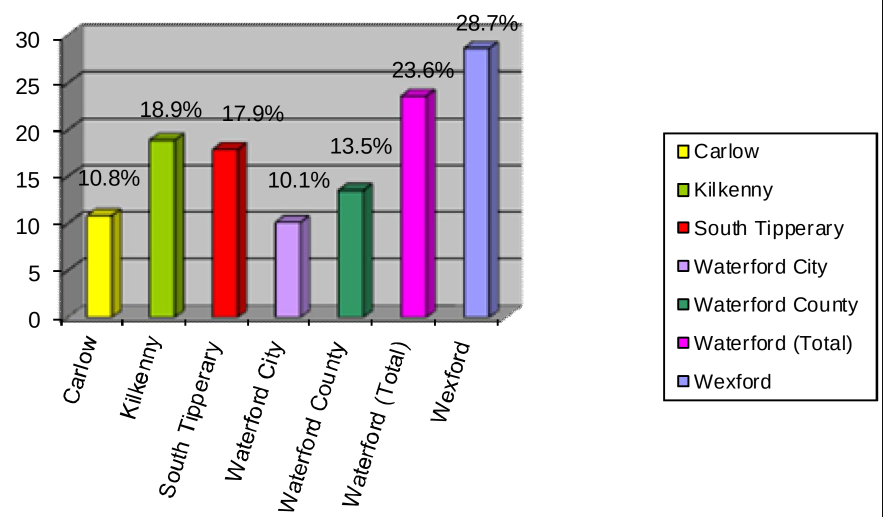
3.3.2 The Regional Planning Guidelines (RPG's) for the South-East Region 2010 – 2022 estimate that the population in the South-East in 2008 was 487,800 (11.0% of the national population). It is further described that in the 1991 to 1996 period population growth in the region was only at 77% of the national rate, but picked up substantially in subsequent years to grow at marginally above the national rate from 2002 to 2006 (105% of the national rate).

3.3.3 Under the National Spatial Strategy (NSS), based on current trends, the south-east region is expected to grow by 440,000 by 2020, of which it is estimated that 138,000 could be located in Waterford City and its hinterland. Under the high growth scenario taking into account the

Table 3.1: South-East Region Population Statistics (Census 2006)

Area	Persons	Males	Females	% State	% South East
State	4,239,848	2,121,171	2,118,677	100	N / A
South East	460,838	232,126	228,712	10.8	100.0
Carlow	50,349	25,611	24,738	1.2	10.8
Kilkenny	87,558	44,263	43,295	2.0	18.9
South Tipperary	83,221	42,250	40,971	1.9	17.9
Waterford City	45,748	22,622	23,126	1.1	10.1
Waterford County	62,213	31,310	30,903	1.5	13.5
Waterford (Total)	107,961	53,932	54,029	2.6	23.6
Wexford	131,749	66,070	65,679	3.1	28.7

Figure 3.1: % Population of South East Region



NSS economic growth projections, there would be around 480,000 persons in the south-east region by 2020, of which 164,000 could be located in Waterford City and its hinterland.

3.3.4 The CSO Regional Population Projections 2011 – 2018 (December 2008) estimates that the South-East (1.8%) will also experience strong population growth compared with a projected annual average increase in population of 1.5% at national level in the period to 2026. Under the more conservative 'traditional' population projection, the population for the south-east region in 2026 is estimated to be 591,000 and 552,000 in 2021.

3.3.5 The Regional Planning Guidelines (RPG's) for the South-East Region 2010 – 2022 estimate that the population targets for the region, and for Waterford, will be as indicated in Table 3.2.

3.3.6 The population target for the Waterford City and Environs area is 62,500 by 2022. The target for the City by 2022 is 55,000. The RPG's describe that the regional economy of the South-East is 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.

3.3.7 It is also of note that the South-East Region has the highest rate of unemployment in the country at 18.1%[4] for the period October to December 2010, well above the national average of 14.8%.

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, Tipperary and Kilkenny. The County is predominantly rural in character. The Waterford City area[5] 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 107,961 in 2006, representing a growth of 6.3% from 2002. As can be seen from Table 3.3, this growth is below the national average of 8.2%, although it is notable that the percentage increase outside Waterford City exceeded the national average at 9.2%. The County experienced a comparable growth between 1996 and 2002 of 9.5%, whilst the City area experienced growth in the same period of 4.8%.

3.4.3 As demonstrated by Table 3.4 overleaf, Waterford City is by far the largest settlement in the County of Waterford. Outside the City, the largest town is Tramore, followed by Dungarvan. Table 3.4 also demonstrates approximately 50% of the County's population, excluding Waterford City, lives in towns with a population in excess of 1,000 persons. When taken together with Waterford City, some 71.6% of persons in the County live in a town or city with a population in excess of 1,000.

3.4.4 Table 3.5 indicates that Waterford has a higher than national average proportion of persons in the 40-59, 60-79 and 80+ cohorts. However, it is notable that these trends do not apply to Waterford City, which has an above national average percentage of persons in the 20-39 years

Table 3.2: South-East Region Population Targets - Regional Planning Guidelines for South-East Region 2010 - 2022

Area	2006	2010	2016	2022	% South-East 2022
South-East	460,838	507,900	542,200	580,500	100
Waterford County	62,213	68,932	73,223	79,495	13.7
Waterford City	45,748	48,500	51,000	55,000	9.5
Waterford City and Envs	49,213	52,500	56,500	62,500	13.5
Waterford (Total)	107,961	117,432	124,223	134,495	23.2

Table 3.3: Waterford City and County Population (Census 2006)

Population	Persons 2002	Persons 2006	Males 2006	Females 2006	Actual change 2002 2006	Percentage change 2002 2006
State	3,917,203	4,239,848	2,121,171	2,118,677	322,645	8.2
Waterford (Total)	101,546	107,961	53,932	54,029	6,415	6.3
Waterford City	44,594	45,748	22,622	23,126	1,154	2.6
Waterford County	56,952	62,213	31,310	30,903	5,261	9.2

4. CSO, Quarterly National Household Survey, Quarter 4, 2010
5. The administrative area covered by the Waterford City Development Plan 2007 - 2013

age cohort. This suggests that Waterford City has an attraction for younger persons.

3.4.5 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 also reflected in the figures for County Waterford.

3.4.6 In terms of social class, Table 3.6 indicates that Waterford City has only 5.5% of professional employees, and also has a well below average percentage of managerial and technical employees. The figures for Waterford County are generally comparable with the figures for the State. Table 3.6 again shows a below average number of professional workers for Waterford City. There is also a high dependency on manufacturing employment.

Table 3.5: CSO 2006 Age Profile for State and Waterford

Age Group	0 - 19 years	20 - 39 years	40 - 59 years	60 - 79 years	80 +
State	27.23	32.71	24.73	12.65	2.66
Waterford	27.82	30.16	25.11	14.04	2.85
Waterford City	26.49	33.63	23.40	13.76	2.71
Waterford County	28.81	27.61	26.37	14.25	2.96

Table 3.6: State and Waterford Social Class Percentage

Area	Professional workers	Managerial and technical	Non-manual	Skilled manual	Semi-skilled	Unskilled	All others gainfully occupied and unknown
State	6.5	26.4	17.0	17.1	11.1	4.3	17.6
Waterford City	5.5	18.9	15.0	16.2	13.6	4.8	26.1
Waterford County	6.8	27.5	16.3	18.7	12.5	4.9	13.3

Table 3.4: Areas With Population Above 1,000 - CSO 2006

Geographic Area	Persons
Waterford City	45,748
Waterford County	62,213
Tramore	8,797
Dungarvan No. 1 Urban	4,680
Dungarvan No. 2 Urban	3,133
Islandikane	2,000
Faithlegg (part)	1,905
Clonea	1,779
Dungarvan Rural	1,449
Killea	1,453
Portlaw	1,393
Kilmacthomas	1,316
Cappoquin	1,266
Tallow	1,215
An Rinn	1,191

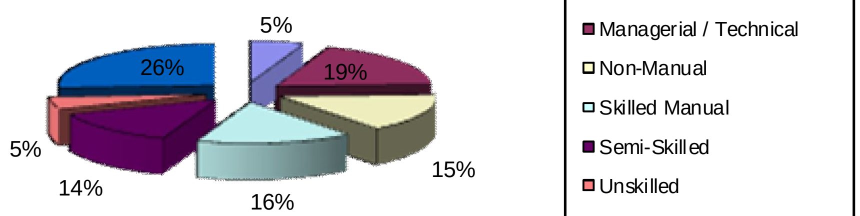


Figure 3.1: Chart of Waterford City Social Class Percentages

Table 3.7: State and Waterford Occupation Percentage

Area	A	B	C	D	E	F	G	H	I	J	K
Waterford City	0.3	0.2	16.7	6.5	7.5	6.7	4.5	13.8	14.6	11.1	18.2
Waterford County	6.8	1.9	15.7	9.8	7.4	7.5	4.5	12	16	10.3	7.9
State	3.5	0.8	11.8	8.8	8.8	9	5.5	13.7	16.5	10.8	11.1

KEY

A	Farming, fishing and forestry managers
B	Other agricultural workers
C	Manufacturing workers
D	Building and construction workers
E	Clerical and office workers
F	Administrative and Government workers
G	Transport workers
H	Sales workers
I	Professional workers
J	Services workers
K	Other workers

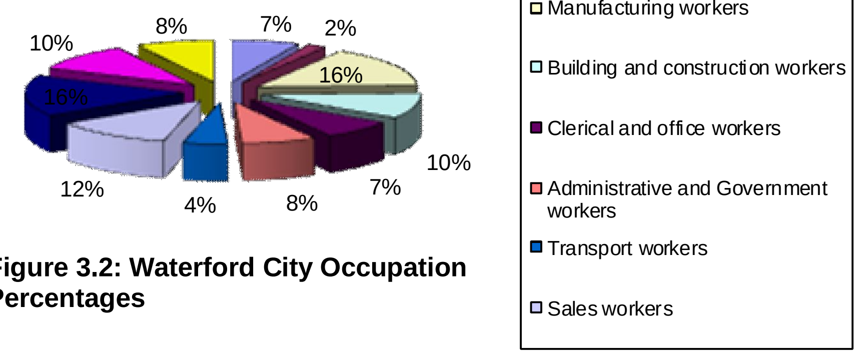


Figure 3.2: Waterford City Occupation Percentages

3.5 RETAIL TRENDS

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

3.5.2 Retail Ireland estimate that the retail market has shrunk by over one fifth in value terms since 2007 due to the recession[6] . The latest CSO (March 2011) Retail Sales Index figures indicate that retail sales volumes, excluding the motor trade, fuel and bars, have declined marginally by 2.1% year on year in volume terms. It is noted however, that the clothing, textiles and footwear sector is faring better, growing by 2.8% year on year in volume terms. Department stores also grew by 2.1%. Relevant extracts from the latest Retail Sales Index are appended to the strategy—Appendix 1.

3.5.3 Against this context, the retail market has shown signs of evolving to meet market demands and to increase attractiveness, evidenced for example by the integration of leisure and retail uses and the increase in retail unit size to create the required economies of scale to compete effectively in an increasingly competitive market. These issues are discussed in further detail below.

General Trends in Retailing

<u>Leisure Use Integration and Extended Opening Hours</u>

3.5.4 Shopping has become interlinked with social and leisure activities. This is becoming evident in the extension in the range of facilities on offer in shopping centres. For example, the inclusion of cinemas in centres such as Liffey Valley, Pavillions (Swords) and Blanchardstown Shopping Centres in Dublin. This integration of leisure and retail use is particularly

6. Retail Ireland, http://www.ibec.ie/IBEC/BA.nsf/vPages/Business_Sectors~retail-ireland

evident in Dundrum Town Centre in Dublin where the retail sector forms part of a wider mix of leisure facilities including a cinema, theatre and a variety of restaurants which front onto the central plaza. This trend is also evidenced in recent permissions in respect of Ballymun Shopping Centre and Northside Shopping Centre in Dublin which include significant proposals for leisure and community facilities.

3.5.5 The permitted Newgate development in Waterford City includes a bowling alley and sports bar and shows the importance of providing a mix of retail, leisure and other complementary facilities in ensuring the success of a centre.

3.5.6 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.

3.5.7 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 and cultural experiences[7]. 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.

3.5.8 On an international level this type of retail development is evolving and include examples such as Xscape in Milton Keynes and the Trafford Centre in Manchester.

3.5.9 There is also an increase in 24 hour store opening although this is concentrated in the convenience section. However, the ability of centres and individual stores to extend opening hours is biased towards larger retailers, with smaller retailers at a disadvantage in terms of relative costs involved and smaller trade volumes. As longer opening hours become more common, this could put smaller retailers at a competitive disadvantage and could lead to a reduction in their market share[8].

<u>Home Shopping</u>

3.5.10 Parker[9] outlines *how "one of the major trends shaping Ireland's retail future is the* rise *of online shopping".* According to IMRG (2006)[11], 10% of all retail sales now take place online.

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

3.5.12 Websites such as eBay have considerably extended the range and profile of internet shopping. In some instances, the internet has been used by traditional mail order service providers as a means of extending their range of customer service and providing a second means of shopping.

3.5.13 However, Women's Fashion retailers are also increasingly selling on line and brands such as Top Shop, ASOS and Monsoon all offer on line purchasing opportunities.

3.5.14 Online convenience retailing has also increased in popularity in recent years with food retailers such as Tesco providing this facility to consumers.

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

3.5.16 The impact of online shopping on high street operators is becoming increasingly evident. Waterstones Book stores have closed a number of their stores citing online competition as the principle reason. HMV have also cited on line competition as a significant issue in terms of their future viability.

7. Locum Consulting, *Experience Retail: A New Form of Destination for Shopping, Leisure and Entertainment,* Locum Destination Review Issue 20, available at: http:// www.locumconsulting.com/LDR20.html
8. BCSC (2004) *The Smaller Towns Report: Delivering retail-led renaissance in towns and smaller cities*. Westminster: London
9. Brophy C. Ireland's Shopping Meccas
10. IMRG (2006). Press release 24/5/2006. Accessed at www.imrg.org
11. Retail Excellence Ireland, *Upward Only Rent Review Clauses Must be Abolished for a Market Rent to Apply*, available at http://www.retailexcellence.ie/images/uploads/downloads/

Convenience Retailing

Increase in Retail Unit Size

3.5.17 There has been a trend for the major convenience retailers to develop larger scale stores in recent years, notwithstanding the cap on convenience floorspace set out in the previous Retail Planning Guidelines (2005) of 3,000 sq. m. net floorspace (3,500 sq. m. in the Greater Dublin Area). The current Retail Planning Guidelines (2012) have increased this cap to 3,500 sq. m. net in Waterford (and Cork, Limerick/Shannon and Galway) and 4,000 sq. m. net in Dublin.

3.5.18 In line with this development, is an expansion in the range of goods now being sold in supermarkets, which has included an increase in the number of individual food and non-food convenience lines and the stocking of comparison goods such as clothing, books and cd's. This has resulted in the merging of comparison and convenience retailing within one store. Examples of this trend include Tesco, Ballybeg and Farronshoneen. It is more clearly seen elsewhere with the development of hypermarket mixed convenience and comparison stores greater than 5,000 sq. metres.

3.5.19 This has implications for planning authorities who have traditionally distinguished between these formats in the formulation of retail policy. It also requires a more complex assessment of retail impact than would previously have been required.

3.5.20 Recent developments have also seen the decentralisation of convenience units. There has also been a noticeable reduction in smaller independent convenience retailers.

Competition from Discounters

3.5.21 The emergence of discount retailers, such as Aldi and Lidl, has been a notable trend over the past decade. It is estimated that these retailers now have approximately 8% of the retail market share.

3.5.22 Discount retailers have significantly increased their number of stores in recent years and it is envisaged that their expansion programme will continue. In this regard, Aldi has recently constructed a second distribution centre in Mitchelstown, Cork which it is anticipated will serve their expanding network of stores to the south of the country.

3.5.23 Within Waterford City, there are five existing discount foodstores – Lidl, Tramore Road, Lidl Ardkeen, Aldi the Glen, Aldi on the Cork Road and Buy Lo on the Cork Road. There is also an Aldi located in Ferrybank within the administrative area of Kilkenny County Council.

Value Driven

3.5.24 A further notable trend is the emphasis on value. This is driven by consumer demand and the demand for retail goods that represent better value for money. Convenience retailers are increasingly introducing more competitively priced own brand labels and there is an increasing trend towards special offers, buy one get one free and other similar price cutting promotional campaigns.

Concentration of Market Share

3.5.25 Analysis of the market share for convenience retailing in Ireland illustrates that the market is dominated by a limited number of retailers, such as Tesco, Dunnes Stores, Superquinn and Super Valu, notwithstanding the relatively recent emergence of discount foodstores such as Aldi, Lidl, and Buy Lo. It is estimated that these major retailers control approximately 80% of the market share. This trend is likely to continue in the future as the major players seek to increase their market share . These retailers have the advantage of greater economies of scale than their smaller scale competitors.

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

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

Out of Centre Convenience Shopping

3.5.28 While the town centre remains the preferred location for new retail development, there is an evident trend of providing convenience shopping facilities in out of centre / edge of centre sites adjacent to large residential populations in order to fulfil a neighbourhood role in shopping.

3.5.29 This can provide a more convenient means of shopping for persons who may only wish to carry out a weekly shop without travelling a greater distance into the town centre. It would also have the benefit of removing traffic from the town centre, as the concept of a large weekly shop generally involves bulk buying and the use of private transport.

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

Farmer Markets and Ethnic Shops

3.5.31 Farmer markets normally operate on a weekly basis and provide the opportunity for independent traders to sell a variety of fresh products such as fruit and vegetables, cheese, speciality breads, and sundry items such as olives, jams, chocolates, wine etc. A food market operates from John Roberts Square in the City Centre.

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

Comparison Retailing

Larger Sized Units

3.5.33 The trend for increased sized units evident in the convenience sector is replicated in the comparison shopping sector. This is most clearly seen in a visual comparison of the newest retail developments and those that are as little as 10 years old. It is also a feature of the newest brand multiples which have recently entered the Irish market. The trend for larger floorspace for comparison stores is for example illustrated in Mahon Point Shopping Centre in Cork where Zara took 1,184 sq. m of retail floor space. H & M, Warehouse and Zara have all also opened flagship stores in Dublin City Centre in units with large floor plates. In the Jervis Street Centre Dublin, New Look recently opened their largest store in Europe and Forever 21 have also recently opened a large new flagship store.

3.5.34 This trend could potentially negatively impact on the ability of town and city centres to provide the required floorspace as the traditional built form of many town and city centres would not readily supply such units in a single property, thereby requiring often complex and time consuming, site assembly. New build shopping centres can represent a simpler and more cost effective way for new multiples requiring large units to enter the market. However, care must be taken to protect the vitality and vibrancy of the town centre. The City Centre Report prepared by Waterford City Council recognises this constraint and a factor that has inhibited the development of some major high street chains from locating in the City.

International Multiples

3.5.35 There is now a far greater presence of European and International multiples in the Irish retail market. Even within the last few years, the retail sector has seen the introduction of new brands into the country, e.g. H & M, New Look, Zara, Starbucks, Gap, Diesel and American Apparel. There are also a number of new entrants seeking to enter the market such as Old Navy, Banana Republic and Naf Naf. The introduction of these international multiples also indicates the demand for higher-order comparison goods in Ireland e.g. House of Fraser & Harvey Nichols.

3.5.36 International retailers require larger size units. However, a side effect of the introduction of such international multiples is a degree of homogenisation of town and city centres, with a potential risk of eroding their inherent character. This is a particular issue for a City such as Waterford which accommodates a high percentage of independent retailers. These retailers are an important part of the retail profile and create a sense of diversity and uniqueness to the retail environment.

Polarisation of Retail Development

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

3.5.38 As noted Waterford City is underperforming in retail terms compared to other gateway Cities and does not offer the same range and diversity of other cities such as Cork and Limerick. This vulnerability will need to be addressed if the outflow of expenditure leakage is to be addressed.

Outlet Centres

3.5.39 The emergence of Outlet Centres and Tourist Outlet Centres both within the Republic and in Northern Ireland has been a significant retail development in recent years. Centres such as Banbridge and Kildare Village Outlet Centre have proven to be successful and can attract custom from a wide catchment area.

3.5.40 The Retail Planning Guidelines (2012) describe that 'Outlet Centres' consist of groups of stores retailing end-of-season or discontinued items at discounted prices and are typically located in out-of-centre locations. It is further noted that as the success of these centres depends on attracting customers from a wide catchment area and from the tourist trade, when they are located out-of-town on greenfield sites, they can divert a significant amount of expenditure on comparison shopping goods away.

Fashion Parks

3.5.41 Fashion parks are an emerging trend. They are scaled-down versions of the large shopping centres in Ireland at present. The idea is to create the equivalent of a town high street on the edge of or outside a town, benefiting from the extra space for carparking in addition to reduced traffic congestion experienced in the town centre. One such Fashion Park is planned for Northside Shopping Centre, Coolock, Dublin. However, none have been developed to date in Ireland. Such developments can have a significant adverse impact on established town and city centres.

Retail Warehousing

3.5.42 The pattern of retail warehousing is now well established in Ireland, with a growing trend for a concentration of warehouse units in retail parks. This form of retailing tends to be more reliant on private transport given the predominantly bulky nature of goods sold. It is frequently not suited to town centre sites owing to the need for a large site area to contain both the unit and the associated car parking. There are a number of such sites in the City. Butllerstown (in the administrative area of Waterford County Council) is the only such park currently operating, however a second park has been constructed but is unoccupied – the Waterford Retail Park Six Cross Road.

3.5.43 The Retail Planning Guidelines (2012) provide a general presumption against further development of out-of-town retail parks, citing the impact upon town centres by reason of the increase in the number of retail parks over the past decade and the blurring of the definition of the goods permitted to be sold in retail warehouse parks (which it is stated often includes non-bulky goods).

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

3.5.45 A notable trend evident in the UK is that the regulatory environment has not been sufficiently strong to avoid the negative effects on town and city centres of development of this type, particularly as a number of early retail parks have been transformed into 'fashion parks' or 'factory outlet centres', with the goods on sale often indistinguishable from those sold at a conventional 'High Street' location[12]. This arose primarily in cases where appropriate conditions restricting the range of goods that can be soled were not incorporated in the planning permissions granted.

3.5.46 In an Irish context, the Retail Planning Guidelines for the Greater Dublin Area (2008 – 2016) also reflect this issue, stating that:

"A recent trend in a number of parks has been a blurring of the division between bulky and non-bulky goods retailers, with some parks now

12. Strategic Policy Committee, Economic Development & Planning of Waterford City Council, *Retailing in Waterford: City Centre and Suburbs – An Appraisal,* (July 2008).

containing major clothing chains and food retailers. Continuing to allow this mixing of uses such as fashion chains into retail parks is likely to result in a negative impact on adjoining town centres as the large size units readily available in retail parks are easily accessible by car, but not public transport, and divert trade away from the town core".

3.5.47 However, it is noted that Planning Authorities and in particular An Bord Pleanala are beginning to take a much more rigorous approach regarding the suitability of retail warehouse parks for certain types of retailing. .

3.6 CONCLUSION

3.6.1 It is evident that Waterford City has experienced significant population growth over the last ten years. However, in accordance with the national economic downturn, this rate of growth can be expected to decline.

3.6.2 Under the Regional Planning Guidelines population projections, the population target for the Waterford City is 55,000, with the population projection for the Waterford City and Environs area being 62,500 by 2022. This will be a significant increase from the existing 45,748 (2006), representing an increase for the City area of 20.2%. The projection of 51,000 for 2016 represents an increase in population for the City of 11.5%.

3.6.3 This growth in population will have significant implications for Waterford City which it is envisaged will benefit from a proportion of this growth. 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. This is in accordance with the principles of sustainable development which seeks to direct services and facilities to key urban centres, such as Waterford City. It is will also be appropriate in the context of the City's designation as the gateway to the region.

3.6.4 There is a need to provide a diversification of employment sectors and for employment opportunities in general, with the south-east region having the highest rate of unemployment in the country as of December 2010. 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.

3.6.5 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. Such evolution and diversification will need to continue into the future to combat the continued difficult economic climate and increased competition from international retailers in both the comparison and convenience markets.

3.6.6 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 Centre retains dominance in terms of retailing, particularly against the potential threat of retail parks competing directly with city centre in terms of products and goods on sale.

3.6.7 In summary, there is a requirement to ensure that Waterford City is placed in a strong position to benefit from the predicted national recovery. It also need to develop to cater for the continuing improvements in the retail market and the growth anticipated for this sector. The provision of appropriately located retail services and facilities can make a contribution in this regard.

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 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 There have also been a number of planning applications for retail development within the City and Suburbs in recent years. A comprehensive list of all of these applications was provided by the technical staff of the planning department of Waterford City Council. The planning register was examined to determine the extent of these applications and in several instances, the file examined to determine the exact quantum of retail floorspace permitted.

4.2.3 Existing data was therefore augmented with register information in order to determine the approximate retail floor area in relation to convenience, comparison and bulky household floorspace in the administrative area of the City.

4.2.4 It should be noted that for the purpose of this study the floor areas relate to the net retail floor area. Net retail floorspace is defined in the Retail Planning Guidelines as:

"The area within the shop or store which is visible to the public and to which the public has access including fitting rooms, checkouts, the area in front of checkouts, serving counters and the area behind used by serving staff, areas occupied by retail concessionaires, customer service areas, and internal lobbies in which goods are displayed, but excluding storage areas, circulation space to which the public does not have access to, cafes, and customer toilets".

4.2.5 Therefore any ancillary spaces such as offices, store rooms etc. is excluded from the net floorspace figure. Where register information detailed the gross floor area of a development, the net area was considered to be 80% of the gross area. This is the industry norm.

Classification

4.2.6 Annex one of the Retail Planning guidelines (2012) provides clear guidance on how to classify convenience, comparison and bulky goods. The floorspace survey categorised the different retail units as follows:

Convenience

- Food
- Alcoholic and non alcoholic beverages
- Tobacco
- Non durable household goods

4.2.7 All supermarkets, newsagent, chemist and retail food outlets (excluding fast food takeaways, restaurants and cafes) were included in this category.

Comparison

- Clothing and footwear
- Furniture, furnishings and household equipment (excluding non-durable household goods)
- Medical and pharmaceutical products, therapeutic appliances and equipment
- Educational and recreation equipment and accessories
- Books, newspapers and magazines
- Goods for personal care
- Goods not elsewhere classified

Bulky Household Goods

Goods generally sold from retail warehouses --where DIY goods or goods such as flatpack furniture are of such size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that large floorspace would be required to display them e.g.

- repair and maintenance materials; --
- furniture and furnishings; --
- carpets and other floor coverings; --
- household appliances; --
- tools and equipment for the house and garden;--
- bulky nursery furniture and equipment including --perambulators;
- bulky pet products such as kennels and --aquariums;
- audio-visual, photographic and information --processing equipment;
- catalogue shops and other bulky durables for --recreation and leisure.

4.2.8 The Guidelines state that the above list is not exhaustive and that bulky goods not mentioned in the list should be dealt with on their merits in the context of the definition of bulky goods.

4.2.9 A summary of the floorspace survey for the City Centre and suburbs is provided in Table 4.1.

Table 4.1: Existing Retail Floorspace within Waterford City Centre

	Convenience sq.m.	Comparison sq.m.	Bulky sq.m.	Total sq.m.
Existing Floorspace breakdown Waterford City	31,675	39,252	41,444	112,371

4.3 HOUSEHOLD SURVEY

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

Methodology

4.3.2 A comprehensive survey of households in Waterford City Council catchment area was undertaken in April 2011 by Demographics Ireland an independent survey company. The objective of this study was to follow the existing shopping patterns within the catchment area of Waterford. The survey area used was designed to be consistent with the drive time isochrones prepared by Demographics Ireland for the purpose of undertaking the quantitative assessment of the scope of future retail development in the city centre. In particular the survey area divided into four main areas:

- Waterford City Council Area.
- 0 to 30 minute drive isochrone from the City Centre excluding the City Council area.
- 30-45 minute drive time from the City Centre.
- 45-60 minute drive time from the City Centre.

4.3.3 Figure 4.1 overleaf outlines a map of the catchment area.

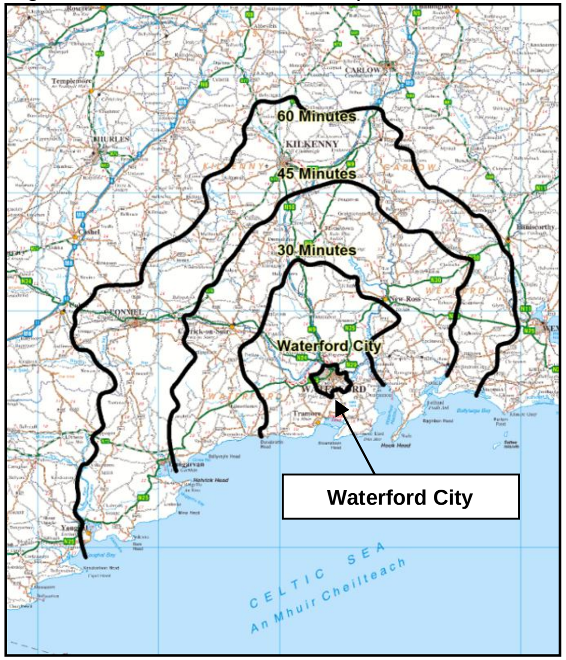


Figure 4.1: Catchment Area

4.3.4 The total sample in this survey is 500 households. A summary of the some of the key results is provided below.

Classification

4.3.5 The survey obtained personal information regarding the gender, age and home address of the respondents. 78% of respondents to the household survey were female. The largest proportion of the respondents to the survey fell into the 35 – 54 age group at 35%.

4.3.6 6.6% of the respondents were under 35, 34% were between 35–54, 26% of respondents were within the 55-64 category and 33% were over the age of 65.

4.3.7 The household survey asked respondents in each zone of which 60% (300) live within the Waterford City Council Area, 20% (100) live within a 30 minute drivetime from the City Centre excluding the City Centre. 10% (50) live within 30-45 minute drivetime of the City Centre and 10% (50) live within a 45-60 minute drivetime from the City.

4.3.8 As earlier noted, the study area for the purposes of the retail strategy is split into four separate areas. In conducting the household study it was considered important to apply a population based weight to the overall survey results to reflect the population breakdown between the different isochrones within the survey area. The total population of the entire catchment area is 259,597 no. persons. The proportionate split of this population between each area of the study area is set out as follows:

- Waterford City Council Area: 45,748 persons;
- 0 to 30 minute drive isochrone from the City Centre excluding the City Council area: 40,408 persons;
- 30-45 minute drive time from the city centre: 57,921 persons;
- 45-60 minute drive time from the city centre: 115,520 no. persons.

4.3.9 The weighting applied for the purposes of the assessment is dependant on the proportion of population within each area. The administrative boundary of Waterford City Council currently comprises 18% of the population of the study area, 16% of persons within the study area are living within the City Centre to 30 minute isochrone (excluding the City Centre) , 22% live within the 30-45 minute isochrone of the City and 44% live within the 45-60 minute isochrone. A weighting has been applied to the results based on the above distribution of population within the study area .

Survey Questions

4.3.10 The household survey primarily contained questions relating to where the respondents carry out their main food shopping, top up shopping, bulky household shopping and clothing and footwear shopping. The survey also included other useful information such as the mode of transport for shopping trips and the frequency of shopping trips. A summary of the results is provided below.

Main Food Shopping

4.3.11 Respondents were asked *"Regarding your household food and grocery shopping, where do you go to normally carry out your main food and grocery shopping".*

4.3.12 Table 4.2 overleaf shows the principal shops used for convenience shopping. The results of this illustrate the prominence of the suburban centres as convenience shopping destinations with 5% of respondents within the survey area doing their main food shopping in Tesco Ardkeen and 4% of respondents doing their main convenience shopping in Superquinn the Kilbarry Centre.

4.3.13 The results illustrated in Table 4.2 above also illustrate the significant degree of retention of convenience expenditure within the City Centre with over 95% of respondents within the administrative boundary of the City Council carrying out their shopping within this area. 58% of respondents within the 0-30 drivetime isochrone also carry out their main grocery shopping within the City.

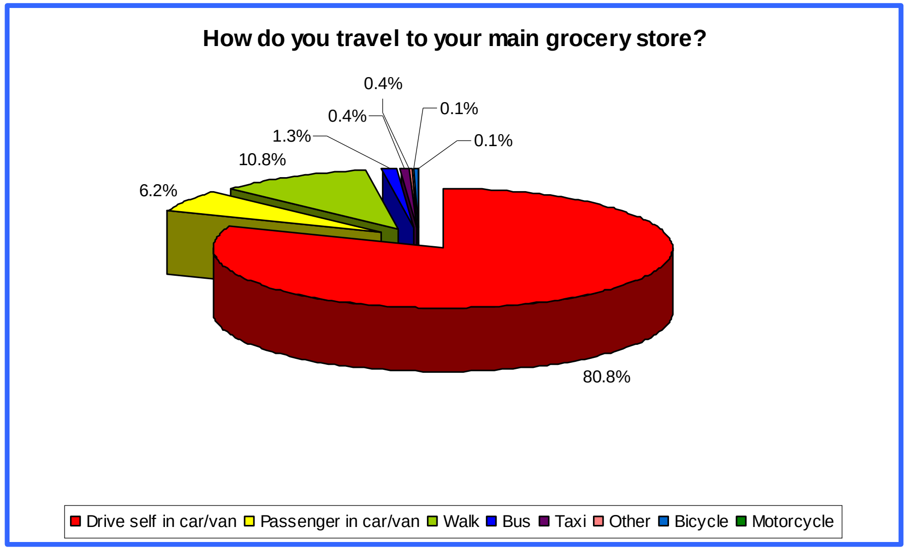
4.3.14 The majority of people within the study area (87%) travel by car, whether they are the driver or just passenger, to do their main food shopping as illustrated in Figure 4.2 overleaf.

4.3.15 75.3% of people living in the study area tend to do their main food shopping once a week. 15% of respondents carry out their main food shopping twice a week. These results were reflected across all area breakdowns within the study area i.e. Waterford City, City to 30 mins, 30-

Table 4.2 "Where do you normally carry out your main food and grocery shopping?".

Location	Base	Q1a Area			
		Waterford City	From City to 30 Minutes	30 - 45 mins	45 - 60 mins
Population Breakdown within each isochrone	**100%**	**18%**	**16%**	**22%**	**44%**
Within Waterford City					
Tesco - Ardkeen/ Farronshoneen	5%	23%	8%	-	-
Superquinn - Waterford	4%	11%	8%	4%	-
Tesco - Lisduggan	3%	11%	7%	-	-
SuperValu - Caulfields	3%	10%	9%	-	-
Dunnes Stores - City Square	3%	9%	6%	2%	-
Local Convenience Store - within Waterford City	0%	1%			
Ardkeen Quality Foodstore	2%	7%	7%	-	-
Tesco - Poleberry	2%	7%	2%	-	-
Lidl - Tramore Road	2%	3%	6%	2%	-
Other	1%	5%	-	-	-
Aldi - The Glen	1%	2%	2%	-	-
Lidl - Ardkeen	1%	2%	3%	-	-
Varies	0%	2%	-	-	-
Tesco - Ballybeg	0%	2%	-	-	-
Total within Waterford City	**28%**	**95%**	**58%**	**8%**	
Outside of Waterford City					
Local Supermarket - Outside Waterford City	53%	1%	28%	70%	74%
Local Convenience Store-Outside Waterford City	17%		5%	22%	26%
Aldi Ferrybank	2%	4%	9%		
Total outside Waterford City	**72%**	**5%**	**42%**	**92%**	**100%**

Figure 4.2: How do you travel to your main grocery store?



45 mins from the City Centre and 45 -60 minutes.

Satisfaction

4.3.16 The results of the household questionnaire demonstrate a high level of satisfaction with existing grocery shopping facilities within Waterford City. When asked if they were satisfied with the existing convenience provision within Waterford City, 34% of respondents outlined that they were very satisfied, 53% were satisfied, 9% were "so so", 4% were not satisfied and 1% were very dissatisfied. These results were reflected when broken down between the separate drivetime isochrones within the study area. It is noteworthy that 76% of the respondents who claimed to be either dissatisfied or very dissatisfied with the existing grocery shopping facilities in Waterford City were residents within the administrative boundary of the City.

4.3.17 Figure 4.3 (overleaf) illustrates the reasons given by respondents within the administrative boundary of the City who claimed to be either dissatisfied or very dissatisfied with the existing convenience goods provision in Waterford. 38% of respondents outlined that goods were too expensive and a further 19% cited the poor range of goods as a reason for dissatisfaction.

Top Up Shopping

4.5.18 In terms of top up shopping, 56% of respondents said that they did their top up shopping in a local store such a symbol store (e.g. Centre, Mace), a corner shop or shop associated with a petrol station. A further 21% of respondents within the catchment area undertake their main food shopping within a Local Supermarket. The major multiples were infrequently mentioned as a store for top up shopping, although the convenience stores Ardkeen Quality Foodstore (2%) and Tesco (9%) were listed as popular locations for top-up shopping.

4.3.19 The form of transport used for top-up shopping by 64% respondents was by car, and 6% of respondents were passengers in a car. A further 27% of respondents walked.

4.3.20 In terms of the frequency of top up shopping, 22.8% of respondents visit a store for a top up purchase everyday, 1.6% of respondents visited the store 2/3 times a week, 16.7% visited the store once a week and 38% visited the store once a fortnight. This clearly indicates the important role of such local shops in providing day to day retail facilities for residents of the city.

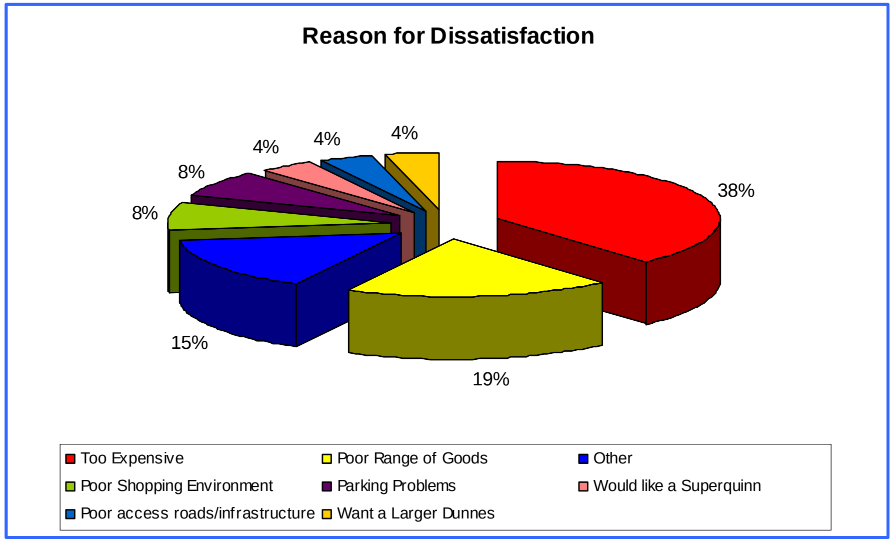
Table 4.3 "Where do you normally carry out your main "top-up" shopping?".

Location	Base	Waterford City Area	0-30 minute	30-45 minute	45-60 minute
Population Breakdown within each isochrone	**100%**	**18%**	**16%**	**22%**	**44%**
Local Convenience Store	56%	32%	58%	74%	56%
Ardkeen Quality Foodstore	2%	11%	3%		
Local Supermarket	21%	2%	4%	14%	38%
Tesco - Ardkeen	2%	10%	2%		
SuperValu - Caulfields	2%	9%	3%		
Tesco - Lisduggan	2%	9%	1%		
Dunnes Stores - City Square	2%	8%	1%		
Other	1%	5%	3%		
Tesco - Poleberry	1%	4%			
Aldi - Ferrybank	1%	3%	3%		
SuperValu - Tramore	2%		10%		
Tesco - Tramore	1%		8%		
Superquinn - Waterford	0%	3%			
Aldi - The Glen	0%	2%			
Tesco - New Ross	3%			8%	2%
Lidl - Ardkeen	1%	1%	2%		
Lidl - Tramore Road	0%	1%	1%		
Varies	1%		1%	2%	2%
Tesco - Ballybeg	0%	1%			
SuperValu - Dungarvan	1%			2%	2%

Comparison Shopping

4.3.21 In terms of shopping for clothes and footwear, respondents were asked which town, shopping centre, retail location or shop they normally visited for these purchases. Overall it was found that the majority of respondents within the study area travelled to Waterford City to carry out their main

Figure 4.3: Reasons for Dissatisfaction?



clothes and footwear shopping than to any other centre. 46% of those surveyed travelled to areas within the City Centre for this purposes i.e. 15% to City Square Shopping Centre, 1% to Georges Court Shopping Centre and 29% to other shops in Waterford City Centre. 1% of the respondents carried out their main clothes and footwear shopping in Waterford suburbs. These results are illustrated in Table 4.4 below.

4.3.22 However, Table 4.4 does illustrate how 50% of the respondents carried out their main clothes and footwear shopping in competing centres such as Kilkenny (31%), Wexford (6%) and Cork (3%) , Other Places (1%), Clonmel (3%), Dungarvan (1%) and New Ross (1%). It is important to note however, that the figures set out within Table 4.4 represent the results of the full study area i.e. results from Waterford City area, 0-30 from Waterford City, 30-45 minutes from Waterford City and 45-60 minutes from Waterford City.

4.3.23 Table 4.5 overleaf provides an area based breakdown of the responses. These results are significant as they illustrate that Waterford City is the main destination for over 90% of respondents within a 30 minute

Table 4.4: "Where do you normally carry out your main Clothing and Footwear Shopping?"

Location	%
City Square Shopping Centre	15%
Georges Court Shopping Centre	1%
Other Shops in Waterford City Centre	29%
Other Shops in Waterford Suburbs	1%
Total within Waterford City	**46%**
Dungarvan	1%
Kilkenny	31%
Wexford	6%
Cork	3%
Dublin	1%
Clonmel	3%
Other Places	1%
Carlow	3%
New Ross	1%
Total Outside Waterford City	**51%**
Online	1%
Don't Know	2%

drivetime of the City, only 6.6% of respondents from within the Waterford City area travel to competing centres such as Kilkenny, Dublin, Cork and Clonmel for their main clothing and footwear shopping. This percentage increases to 10% of respondents travelling to a competing centre from the 30 minute drivetime catchment and 42% from within the 30 to 45 minute catchment. Kilkenny in particular exerts a significant influence, with 18% of respondents within the 30-45 minute drivetime travelling to Kilkenny and 58% within the 45 to 60 minute drivetime. These results indicate however, that Waterford City does not have sufficient attraction to draw persons from the wider catchment area, and these people are choosing to travel to competing centres such as Kilkenny. This may be an indication that the City is not fulfilling its gateway function as a regional shopping destination.

4.3.24 In terms of the mode of transport used to carry out clothing and footwear shopping, 75% of respondents travelled by car and 6.7% of respondent's

Table 4.5:"Where do you normally carry out your main Clothing and Footwear Shopping?" (results split between areas of catchment area)					
Location		**Waterford City**	**From City to 30 mins**	**30 - 45 mins**	**45 - 60 mins**
Population breakdown within each isochrone	**100**	**18%**	**16%**	**22%**	**44%**
City Square S.C.	15%	40%	29%	8%	2%
George's Court S.C.	1%	2%	6%	-	-
Other shops in Waterford City Centre	29%	49%	53%	40%	6%
Other shops in Waterford Suburbs	1%	1%	2%	4%	-
Total within Waterford City	**46%**	**92%**	**90%**	**52%**	**8%**
Dungarvan	1%		1%	2%	2%
Kilkenny	31%	0%	6%	18%	58%
Wexford	6%	0%	-	8%	10%
Cork	3%	2%	-	2%	6%
Dublin	1%	2%	1%	-	-
Clonmel	3%	0%	-	6%	4%
Other Places	1%	1%	2%	4%	-
Carlow	3%		-	2%	6%
New Ross	1%		-	6%	-
Total Outside Waterford City	**51%**	**6%**	**10%**	**48%**	**86%**
Online	1%	2%	-	-	2%
Don't Know	2%				4%
Total Other	**3%**	**2%**			**6%**

were passengers in a car. 9.17% of respondents walk and 6.3% take the bus.

4.3.25 Figure 4.4 illustrates the frequency of clothes and footwear purchases by respondents. 4.0% of respondents stated that they went shopping for clothes and footwear once a week, 21% shop for clothes and footwear once and month and 21% go shopping for clothes and footwear every 6 months.

Satisfaction

4.3.26 The results of the household survey demonstrate a high level of satisfaction with existing comparison facilities within Waterford with 27.8% of respondents noting that the were very satisfied with the existing range of clothes shopping facilities in Waterford and a further 41% claiming to be satisfied. 20.9% of the respondents outlined that they were "so so" (i.e. neither satisfied nor dissatisfied), 6.1% noted that they were not satisfied and 4.2% were very dissatisfied. It is noteworthy that of the respondents who claimed to be either dissatisfied or very dissatisfied with the existing comparison goods provision within the City Centre 78% were resident within the administrative boundary of Waterford City Council.

4.3.27 A number of reasons for dissatisfaction were given by the respondents within the City Centre administrative boundary These include "poor range of goods" (81%), "too expensive" (4%) and "poor shopping environment" (4%). 4% of the respondents within the City Centre administrative boundary also stated that they would like a Marks and Spencer.

Figure 4.4: How often do you shop for clothes and footwear

Bulky Goods Shopping

4.3.28 The bulky goods category was split between furniture and electrical products for the purposes of the survey. 21.4% of respondents noted that they undertook their bulky goods furniture shopping in various locations. For the purpose of calculating inflows and outflows of bulky goods expenditure to the study area it is assumed that 70% of the respondents who noted that they undertook their bulky goods shopping in various locations in the City Centre administrative boundary and 0-30 minute isochrone were referring to various locations within the City Centre. 6.7% of respondents within the overall catchment area noted that they did their main furniture shopping in Harvey Norman. 19% of respondents within the administrative boundary of the City travel to Buttlerstown for the furniture requirements. This table illustrates a significant proportion of leakage on bulky goods furniture from the City.

4.3.29 The three main locations for electrical goods retail in the catchment area were Kelly and Dollard (14.5%) on the Ring Road Retail Park in Waterford, Various (10.3%) and Harvey Norman in Buttlerstown Retail Park (4.5%).

4.3.30 As would be expected, most people (56%) surveyed travel in a car to the area where they conduct their bulky goods shopping. A further 38% of respondents had their bulky goods delivered.

Satisfaction

4.3.31 The results of the household survey demonstrate a high level of satisfaction with existing bulky goods facilities within Waterford with 23% of respondents stating that they were very satisfied and a further 55% outlining that they are satisfied. Of the respondents who noted that they were either dissatisfied (2%) or very dissatisfied (2%) with existing bulky goods provision in Waterford the main reasons for dissatisfaction were “poor range of goods” (52%) and “too expensive” (16%).

Competing Centres

4.3.32 Given the location of Waterford City and its proximity to a number of other large competing centres, respondents were asked if they shop in Dublin, Kilkenny, Cork, Clonmel and Wexford. The results are illustrated in Table 4.8 overleaf.

4.3.33 The breakdown of responses per geographical area is considered significant when assessing the above results. Kilkenny City exerts a

Table 4.6: "Where do you normally carry out your main Bulky Goods Furniture Shopping?" (results split between areas of catchment area)

Bulky Goods Shopping Location- Furniture	Total %	Q1a Area			
		Waterford City	From City to 30 Minutes	30 - 45 mins	45 - 60 mins
Population Breakdown within each isochrone	**100%**	**18%**	**16%**	**22%**	**44%**
Waterford City Administrative Area					
Argos, Great Georges Street	0.4%	1.3%	1.0%		
Michael Crowe's, Millars Marsh Waterford	2.5%	6.3%	6.0%	2.0%	
Kelly and Dollard, Ring Road Waterford	0.8%	4.7%			
Shaws - Waterford	0.9%	4.0%	1.0%		
Burkes, 6 Cross Road Roundabout	0.6%	2.3%	1.0%		
DID - Ardkeen, Waterford	0.1%	0.7%			
Greenwoods, 6 Cross Roads Waterford	1.0%	0.7%	3.0%	2.0%	
Other shops in Waterford	6.5%	16.0%	9.0%	2.0%	4.0%
Sienna, Tramore Road	0.8%	1.0%	4.0%		
Total Waterford City	**13.7%**	**37.0%**	**25.0%**	**6.0%**	**4.0%**
Waterford City Environs					
Harvey Norman - Buttlerstown Waterford	6.7%	19.0%	15.0%	4.0%	
Total Waterford City Environs	**6.7%**	**19.0%**	**15.0%**	**4.0%**	
Other Locations					
Not in Waterford	3.8%	7.3%	13.0%	2.0%	
Electrical City - Kilkenny	6.2%				14.0%
Murphy's New Ross	1.6%	0.3%	4.0%	4.0%	
Ikea- Dublin	1.2%	0.7%	1.0%		2.0%
DID - Not Waterford	3.5%				8.0%
Harvey Norman - not in Waterford	0.1%	0.7%			
Shaws - Not in Waterford	0.9%				2.0%
Other shops - Not Waterford	15.1%	4.0%	10.0%	14.0%	22.0%
At Auction	0.4%	0.3%	2.0%		
Internet	0.9%				2.0%
Total Other Locations	**33.7%**	**13.3%**	**30.0%**	**20.0%**	**50.0%**
Other					
Don't Know	24.9%	8.0%	1.0%	66.0%	20.0%
Various	21.0%	22.7%	29.0%	4.0%	26.0%
Total Other	**45.9%**	**30.7%**	**30.0%**	**70.0%**	**46.0%**

Table 4.7: "Where do you normally carry out your main Bulky Goods Electrical Shopping?"(results split between areas of catchment area)

Bulky Goods Shopping Location- Furniture	Total %	Q1a Area			
		Waterford City	From City to 30 Minutes	30 - 45 mins	45 - 60 mins
Population breakdown within each isochrone	100%	18%	16%	22%	44%
Waterford City Administrative Area					
Kelly and Dollard	14.5%	40.0%	40.0%	4.0%	
Shaws - Waterford	1.0%	0.7%			2.0%
Sherwood's - Waterford	1.6%	2.0%	2.0%		2.0%
Tesco - Waterford	2.3%	6.0%	2.0%		2.0%
Argos - Waterford	1.3%	1.7%	1.0%	4.0%	
Kavanagh's Electrical Wholesale	0.4%	2.0%			
Other shops in Waterford	2.2%	7.0%	6.0%		
Sound Store	3.5%	6.0%	4.0%		4.0%
Woodies	1.2%	1.7%			2.0%
Total Waterford City Administrative Area	**28.0%**	**67.1%**	**55.0%**	**8.0%**	**12.0%**
Waterford City Environs					
Harvey Norman - Buttlerstown	4.5%	9.3%	12.0%	4.0%	
Total Waterford City Environs	**4.5%**	**9.3%**	**12.0%**	**4.0%**	
Other Locations					
DID - Not Waterford	2.7%	7.3%	6.0%	2.0%	
Other shops not in Waterford	11.6%	1.3%	2.0%	10.0%	20.0%
Electrical City - Kilkenny	10.3%		1.0%	10.0%	18.0%
None in Area	1.1%	1.0%	6.0%		
Joyce's - New Ross	2.1%		2.0%	8.0%	
DID - Not Waterford	5.3%				12.0%
Argos - Not Waterford	4.8%			2.0%	10.0%
Shaws - Not Waterford	2.8%		1.0%		6.0%
Sherwood's - Not Waterford	0.9%			4.0%	
Tesco - Not Waterford	0.2%		1.0%		
Total Other Locations	**41.8%**	**9.6%**	**19.0%**	**36.0%**	**66.0%**
Other					
Various	10.3%	10.3%	14.0%	4.0%	12.0%
Don't Know	14.7%	3.7%		48.0%	8.0%
Internet	0.9%				2.0%
Total Other	**25.9%**	**14.0%**	**14.0%**	**52.0%**	**22.0%**

Table 4.8 "Do you Shop in Dublin, Kilkenny, Cork Waterford or Clonmel?"

Location	Yes Total %	Q1a Area			
		Waterford City	From City to 30 Minutes (excl. City Centre Administrative boundary)	30 - 45 mins	45 - 60 mins
Population Breakdown within each isochrone	**100%**	**18%**	**16%**	**22%**	**44%**
Dublin	21.6%	25.0%	27%	18%	20%
Kilkenny	54.0%	26.7%	46%	50%	70%
Cork	20.7%	30.3%	24%	20%	16%
Wexford	16.9%	11%	19%	22%	16%
Clonmel	30.2%	20.7%	31%	54%	22%

significant pull within the City to 30 minute, 30-45 and 45 to 60 minute drivetime as illustrated in Table 4.8 above. It is noted however, that as some of the 45 and 60 minute catchment falls within Kilkenny County and City that this trend is not surprising.

4.3.34 These results are also reflected for the attraction of Clonmel where 54% of respondents within the 30 to 45 minute drivetime of Waterford would shop in Clonmel and 22% within the 45 to 60 minute drivetime. It is noted that some of the 45 and 60 minute catchment falls within County Tipperary and the Clonmel catchment.

4.3.35 Respondents were also asked how often they visited other centres such as Dublin, Kilkenny and Cork for shopping purposes. The results are illustrated on Table 4.9 overleaf. This revealed that 51.6% travel to Kilkenny at least once a week for shopping purposes.

4.3.36 This again highlights the attraction of Kilkenny within the 30 to 45 and 45 to 60 minute drivetime of Waterford City. 52% of respondents within the 30 to 45 minute drivetime and 89% within the 45-60 minute drivetime travel to Kilkenny City for their shopping requirements.

Improvements to Waterford City

4.3.37 Respondents were also asked what improvements could be made to the shopping experience in Waterford City. The results are illustrated in Table 4.10.

4.3.38 Parking was listed as the principle improvement respondents wanted to see (26.9%). Respondents also noted that a better range of shops and a Marks and Spencer's as well as other larger stores would be a desired improvement.

Table 4.9: Frequency of Visits to Competing Centres (results split between areas of the catchment area)

	Dublin	Kilkenny	Cork	Wexford	Clonmel
Base Total					
Total Nos	**121**	**186**	**132**	**71**	**131**
At least once a week	47	96	54	6	10
Once a fortnight	4	9	1	2	6
Once a month	23	31	15	8	24
Once or twice a year	47	50	62	22	52
Only Once				33	39
Waterford City Administrative Area					
Total Nos	**75**	**80**	**90**	**33**	**62**
At least once a week	30	33	35	1	1
Once a fortnight	3	1	1	4	
Once a month	12	18	5	11	13
Once or twice a year	30	28	49	1	31
Only Once					17
City to 30 minute isochrone (excluding City Centre)					
Total Nos	**27**	**46**	**24**	**19**	**31**
At least once a week	12	19	9	1	2
Once a fortnight	1	4			2
Once a month	7	11	8	1	6
Once or twice a year	7	12	7	8	12
Only Once				9	9
30-45 minute isochrone from City Centre					
Total Nos	**9**	**25**	**10**	**11**	**27**
At least once a week	1	13	6	2	4
Once a fortnight	1	2			3
Once a month		1	1	2	4
Once or twice a year	1	9	3	3	8
Only Once	7			4	8
45 to 60 minute isochrone from City Centre					
Total Nos	**10**	**35**	**8**	**8**	**11**
At least once a week	4	31	4	3	3
Once a fortnight		2		1	1
Once a month	3	1	1	1	1
Once or twice a year	3	1	3		1
Only Once				3	5

Table 4.10: Suggested Improvements to Waterford City

Suggested Improvements to Waterford City	%
Improve Parking	26.9%
Ok as is	28.2%
Marks and Spencer and other large stores are needed	6.6%
Better range of shops	3.9%
Other	13.5%
Less Expensive Shops	4.1%
Too far away	10.6%
Clean up the City Centre	0.8%
Better Public Transport	3.2%
More Clothes Shops needed	0.8%
More Coffee Shops Needed	0.4%
Reduce rents/rates on shops	0.4%
More shops for older people	0.2%
More disabled access	0.2%
Shopping Centre is needed in Ferrybank	0.1%
More Park and Ride	0.2%
Better Customer Service	0.1%

General Conclusions

4.3.39 The results of the household survey are significant in determining the levels of inflows and outflows of convenience, comparison and bulky goods expenditure from the administrative boundary of the City.

4.3.40 The survey establishes that approximately 95% of convenience goods expenditure in Waterford City is retained by the City and attracts approximately 58% of convenience goods expenditure from the 0-30 minute drivetime isochrone from the City. The results of the household survey as they relate to bulky goods expenditure illustrate a high proportion of leakage to areas just outside the administrative boundary of the City such as Buttlerstown.

4.3.41 Approximately 92% of comparison goods expenditure in Waterford City is retained within the administrative boundary of the City and the area attracts a further 90% of comparison expenditure from the 0-30 minute drivetime isochrone and 52% from the 30-45 minute isochrone. In addition the survey identifies an inflow of 8% of comparison goods expenditure from the 45-60 minute drive time isochrone from Waterford City Centre.

4.3.42 The survey results also demonstrate a high level of satisfaction with the existing convenience, comparison and bulky goods floorspace within the City.

4.3.43 The survey results however, also reveal the attraction of other competing centres most notably Kilkenny for respondents. This is particularly relevant within the 30-45 minute isochrone where 18% of respondents within this area would travel to Kilkenny and the 45—60 minute isochrone where 58% of respondents would travel to Kilkenny for their main comparison shopping. It is also noted that respondents frequently visited the capital and other major competing centres such as Cork and Clonmel on a regular basis. Whilst, the main clothing and footwear shopping took place in the City, it is likely that incidental spending takes place on these competing centre visits. The draw of Kilkenny is notable both from within the city and from its wider catchment. This reveals that Waterford may not have the necessary range of retail attractions to draw customers from a wider area and in this regard it is not fulfilling its role as a regional gateway. It is evident that there is a degree of leakage expenditure. It is also notable that respondents detailed the requirement for a more diverse range of retail outlets within the City Centre and that Marks and Spencer's is specifically mentioned in this context.

4.4 SHOPPER'S SURVEY

4.4.1 The purpose of the shopper survey is to provide a profile of the people who visit Waterford City Centre for shopping purposes. The shopper's survey helps to analyse the shopping patterns of people who visit the City Centre from outside the County.

Methodology

4.4.2 The shopper's survey was undertaken in Waterford City Centre in April 2011. It was also carried out by Demographics Ireland and included a street interview with 200 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).

4.4.3 Respondents were interviewed both at the weekend and during mid week, during the principle shopping hours. Surveys were not carried out over bank holiday weekends, as these may have distorted normal shopping patterns. A summary of the results is provided below.

Classification

4.4.4 All respondents to the survey were over the age of 15 and 56% were female and 44% were male. The age spectrum was much younger than found on the telephone survey, with 50% of respondents under the age of 35, which reflects the high level of discretionary spending in the younger age groups.

Survey Questions

4.4.5 The principle questions in the shopper's survey were as follows:

- Where the respondent came from.
- Main purpose of trip to Waterford City.
- Main mode of travel to Waterford City.
- Frequency of visits to Waterford to shop.
- Main reasons for travelling to Waterford City.
- The main shopping centres/shopping streets frequented.
- The main stores visited.
- The main attractions of the City.
- What improvements are needed in the City.

4.4.6 A summary of the Survey Results is provided as follows:

Where the Respondents Were From

4.4.7 The majority of the respondents interviewed (62%) were from the Waterford City area. 15% of respondents were from areas in Co. Waterford including Dungarvan, Tramore and Dunmore East. A further 9% of respondents were from Co. Wexford and 9% from Co. Kilkenny.

Main purposes of Trip to Waterford

4.4.8 Respondents were asked the main purposes for their trip to Waterford. 196 of the 200 respondents were in the City for shopping, 122 noted that they live in Waterford and 38 stated that they work in the City. The fact that the majority of the respondents stated that the main purpose of their visit to the City Centre is positive as it demonstrates the draw of the City Centre as a retail destination.

Frequency of Visits

4.4.9 Respondents were asked how frequently they visit the City Centre to shop or look around the shops. 45% of respondents outlined that they visited the City Centre more than 3 times a week and a further 18% visit the centre more than twice a week. The results are illustrated on Figure 4.6 below.

4.4.10 It is noted that the frequency of visits varies depending on the residence of the respondent as illustrated in Table 4.11.

4.4.11 The frequency of visits to the City Centre also varies between the age groups, with 83% of the respondents under 35 visiting the City Centre once a week or more.

Figure 4.5: Where do you come from?

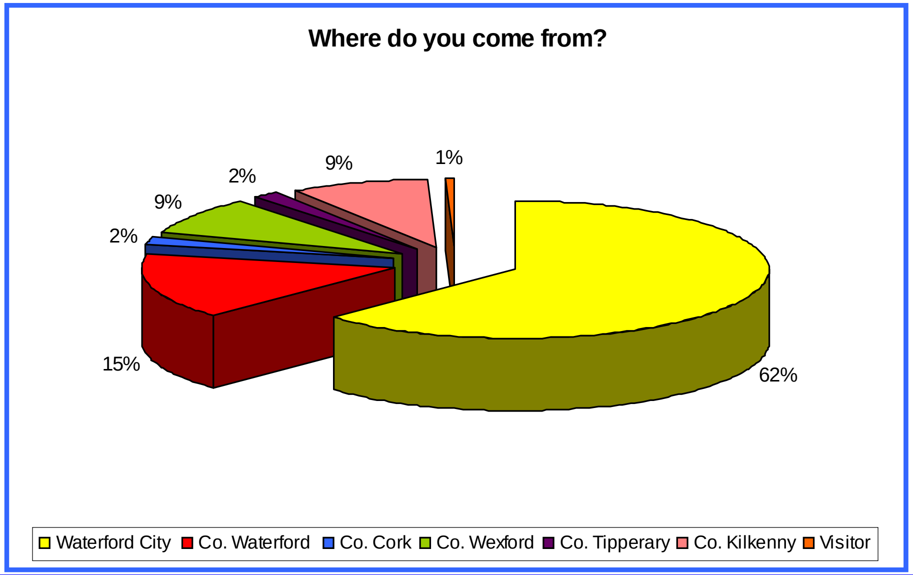


Figure 4.6: Frequency of Visits to Waterford City

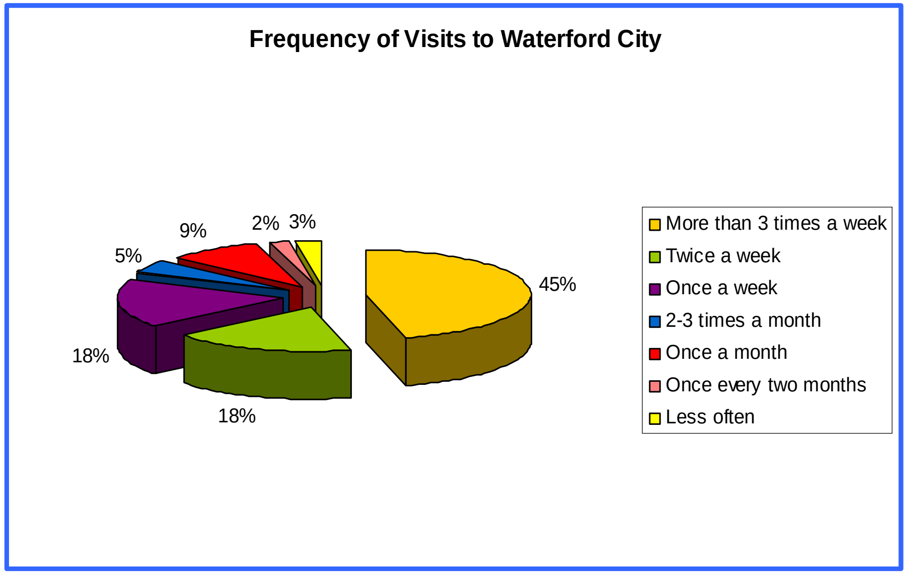


Table 4.11: Frequency of visits to Waterford City Centre – split by place of residence

Location	More than 3 times a week	Twice a week	Once a week	2-3 times a month	Once a month	Once every two months	Less often
Waterford City	71	29	21	1	4		
Co. Waterford	10	4	10		1	2	
Co. Cork					1	1	1
Co. Wexford	2		2	3	8		3
Co.Tipperary					3		
Co. Kilkenny							
Visitor							1

Method of Travel

4.4.12 46% of those surveyed stated that they had travelled to Waterford by car. 29% walked and 18.5%% travelled by bus. The remaining 6.5% were categorised in the other category which includes bicycle, motorcycle etc.

Reasons for Visiting Waterford

4.4.13 Respondents were asked to identify their main reasons for visiting Waterford City. Table 4.12 illustrates that the most popular reason for travelling to Waterford City (excluding "other") was browsing around the shops (14.5%). A further 21.5% of respondents visited the City to purchase clothes (women's clothes 12%, men's clothes 5.5%, children's clothes 3.5%). 13% of respondents were in Waterford to do their main grocery shop. In total 57% of respondents stated that their main purposes for visiting the City Centre were shopping. This result is significant as it illustrates the attraction of the City Centre as a retail destination. See Table 4.12.

4.4.14 When asked what other reasons they had for visiting the City Centre, 58% of respondents outlined that they were "browsing the shops", 25.4% of respondents were eating out and 13% were doing "other grocery shopping". This again highlights the attraction of Waterford City Centre as a retail destination.

Table 4.12 Reason for visiting Waterford City

Reason for Visiting Waterford	Nos.	%
Other	45	22.5
Browsing around shops	29	14.5
Main Grocery shop	26	13
Clothes - Women	24	12
Work	19	9.5
Clothes - Men	11	5.5
Eating out	8	4
Clothes - Children	7	3.5
Other Grocery shopping	6	3
Business	6	3
Household/furnishing	4	2
Hair/beauty	4	2
Footwear	2	1
Jewellery/Accessories	2	1
DVD's/CD's	2	1
Banking/	2	1
Drinking/pub	2	1
Clothes	1	0.5

Shopping Areas Frequented

4.4.15 Respondents were also asked what areas and streets they visited on their visit to the City Centre. The results of this illustrated in Figure 4.7 overleaf.

4.4.16 The results of this survey clearly demonstrate the prominence of the City Square Shopping Centre, with 81% of respondents visiting this centre and Barronstrand/Broadstreet within 54% of respondents citing this area. 35% of respondents also noted that they visited Georges Court Shopping Centre and 27% of respondents also visited Poleberry.

Attractions

4.4.17 Respondents were asked to identify what they felt were the main attractions of Waterford City Centre. "Proximity to home," "good choice of clothing and footwear stores" and "good choice of department stores"

Figure 4.7: What shopping centre and streets have you visited ?

were ranked as the top 3 attractions of the City. The pedestrianised streets and choice of cheap discount shops also ranked highly. Table 4.13 lists the main attractions of the City.

Improvements Needed in the City Centre

4.4.18 Respondents were also asked to list what three improvements would encourage them to shop in Waterford City more often. The results are listed on Table 4.14 overleaf. The improvements most frequently mentioned were "free/cheaper parking", "more shops", "more parking" and "improvements to the streetscape".

Conclusion Shopper's Survey

4.4.19 The results of the shopper's survey demonstrate the draw of the Waterford City Centre from the surrounding catchment area with 37% of respondents being from outside of the administrative boundary of the City. The survey results are also significant as they illustrate the attraction of the City Centre as a retail destination, with 98% of respondents listing "shopping" as one of their main reasons for visiting the City Centre.

Table 4.13 Main Attractions of Waterford City Centre

Main Attractions	Nos	%
Close to home	135	67.5
Good choice of Clothing/footwear shops	70	35
Good choice of Department/variety shops	44	22
Pedestrianised streets	43	21.5
Good choice of Cheap/discount shops	42	21
Easy to get to by car	41	20.5
Easy to get to by bus	29	14.5
Attractive shopping environment	29	14
Safe environment	28	5
Good shopping malls	24	12
Close to work	23	11
Good choice of designer shops	23	5
Good choice of places to eat/drink	21	10.5
Good parking	15	7.5
Good facilities for the disabled	6	3
No Reason	6	3
Individual stores	4	2
Easy to get to by train	2	1
Good facilities for Children	2	1
Free parking	1	0.5

4.4.20 The surveys indicate that shoppers to the City are largely reliant on private vehicular transport. This is also reflected in the question regarding what improvements are needed to the City Centre with "need for more parking" and "cheaper parking" scoring high in the surveys. The results of this survey clearly demonstrate the prominence of the City Square Shopping Centre and Barronstrand Street as prime retail locations within the City Centre. The South City Quay however is not classified as a popular location for shopping by respondents to the shopper's survey.

4.4.21 The key attraction to the City Centre was listed as "proximity to home" which illustrates the level of expenditure retention within the City Centre. In

Table 4.14 Improvements needed to Waterford City Centre

Improvements	Nos.	%
Free/cheaper parking	105	52.5
More shops	75	37.5
More parking	45	22.5
Improvements to streetscape	36	18
More public toilets	34	17
Other	32	16
More cafes and restaurants	24	12
Nothing	24	12
More cash machines	22	11
Improved cleanliness	20	10
More shopping malls	19	9.5
More leisure facilities	16	8
More seating areas	15	7.5
More events	15	7.5
More bars and nightlife	10	5
Improved car access	9	4.5
More designer shops/boutiques	9	4.5
Better public transport	8	4
More facilities for children	8	4
More gyms/health clubs	6	3
More pedestrianised streets	4	2
More facilities for disabled	4	2
Improved security	3	1.5
Crèche	3	1.5
Don't know	2	1

accordance with the results of the household survey the shopper's survey also identified the requirement for "more shops" within the City Centre. Improvements to the streetscape also ranked highly.

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. In particular this section of the report assesses new major retail developments which have been permitted and developed in the City in the past number of years and discusses the implications of this development for the future retail role and function of the City. The vitality and viability of the City Centre as well as the principle District and Neighbourhood Centres and Retail Warehouse Parks in the City suburbs are also 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 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 (2012) 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:

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

<u>Accessibility</u> **-** 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.

<u>Amenity</u> **-** 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.

<u>Action</u> **-** 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. These indicators include diversity of uses, competitiveness, retailer representation, accessibility and environmental quality. 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. The Guidelines accept that in many instances it may be difficult to obtain all the vitality and viability health check indicators.

5.1.5 In order to determine the vitality and viability of Waterford City Centre and the District and Neighbourhood Centres in the suburban areas 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.

<u>Waterford City Centre</u>

5.2 ATTRACTIONS

5.2.1 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 18^{th} century architecture in the City including the Chamber of Commerce building, the City Hall and the Bishop's Palace (Image 5.1).

5.2.2 The City accommodates Reginald's Tower (Image 5.2), 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.

5.2.3 Waterford City is also the home of Waterford Crystal, the world-famous hand-crafted, cut glass product. House of Waterford Crystal opened on the Mall in 2010. It is envisaged that between 200,000 and 300,000 visitors will visit the centre on an annual basis. This is a major tourist attraction and City benefits from the tourist influx to this facility.

5.2.4 Other attractions include:

<u>Waterford Museum of Treasures</u>
Waterford Museum of Treasures comprises of three museums chronicling over one thousand years of history, the museums are as follows;

Image 5.1: Fine Civic Buildings on George Street

Image 5.2: Reginald Tower

Image 5.3: Theatre Royal

- Reginald's Tower – Treasures of Viking Waterford
- Choristor's Hall – Treasures of Medieval Waterford
- Bishop's Palace – Treasures of Georgian Waterford
- The Medieval Museum, Choristor's Hall, is currently under construction and due to be complete June 2012.

<u>Garter Lane Arts Centre</u> - 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.

<u>Christ Church Cathedral</u> - considered one of the finest 18th century ecclesiastical buildings in Ireland. Hosts regular performances and musical recitals.

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

5.2.5 Other significant features and attractions in the City include St. Patrick's Church, Chapel Lane, Cathedral of the Most Holy Trinity (Image 5.4), Clock

Image 5.4: Cathedral of the Most Holy Trinity

Image 5.5: Brother Ignatious Museum and Conference Centre

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 (which houses the Waterford Municipal Art Gallery), St. Johns Church, St. Patrick's Church and Priory of St. Savior. A new 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.

5.2.6 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 summer 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.

5.2.7 The Waterford International Festival of Light Opera is an annual event that has been held in the Theatre Royal since 1959. It has recently been re-branded as the Waterford International Festival of Music and now takes place in November.

5.2.8 The Tall Ships Festival was again held in the City In July 2011. Over 420,000 people attended the event making it one of the largest attractions ever held in the south east. The festival attracted a significant number of visitors to the City . The festival included an entirely free festival of music, culture and food.

5.2.9 The Waterford Harvest Food Festival takes place annually in September along the Quays and in 2010 saw the South Quay closed off to traffic two successive Sundays and a free concert on the Saturday night. The festival offers visitors demonstrations, workshops and tours of local producers, numerous markets, tastings and dinners.

5.2.10 There are two Arts Festivals of note in the City; The Imagine Arts Festival in October and The Fringe Arts Festival in September.

5.2.11 The cultural, tourism and artistic attractions of the City are notable and have the potential to attract significant visitors and tourists to the City.

5.2.12 The River Suir bisects the City and is a major amenity and natural feature. The 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, since the completion of the Bypass, that vehicular traffic on this route has lessened significantly. In this regard there is scope to significantly improve and enhance the environmental quality of the quays in the future and develop their amenity value.

5.2.13 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.

5.2.14 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

Images 5.6 and 5.7: City Quays Car Parking

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.

5.2.15 A characteristic of the City is the fact that the buildings along the quays

Images 5.8 and 5.9: Streets radiating from City Quays to the City Centre

face the river rather than turning their back on it, a characteristic which is found in many other 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 Days Hotel, 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.

5.2.16 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 town are focussed on Barronstrand Street, Broad Street, John Roberts Square, Georges Street, John Street, Michael Street, Arundel Square and the South Quays.

5.2.17 The prime retail locations include Barronstrand Street (Image 5.10) and

John Roberts Square, where a number of high street retailers including Tommy Hilfiger, Awear, Monsoon, Clarkes, H. Samuel, Penneys, Boots, Lifestyle, Shoe Zone, Bennetton and Lifestyle are represented. In addition there is the City Square Shopping Centre (Image 5.12). This facility opened in 1993. The centre which is anchored by Debenhams Department Store and 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 high rates of occupancy and has good customer facilities and a clean internal environment. However, the appearance of the centre is somewhat dated.

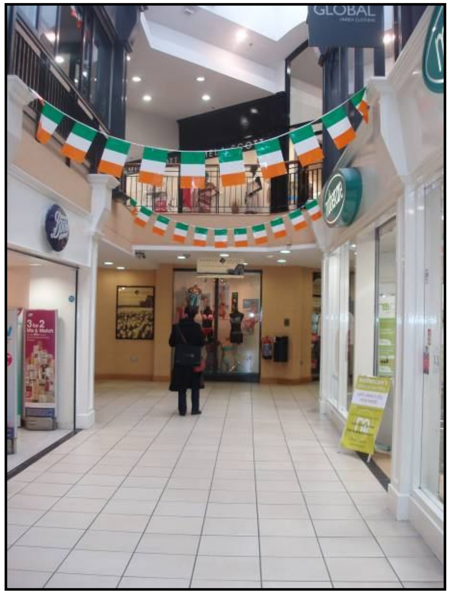


Image 5.10: George's Court Shopping Centre

Image 5.11: Barronstrand Street

5.2.18 Georges Court (Image 5.10) is another small enclosed Mall located off Barronstrrand Street. This also accommodates a number of significant high street retailers including Mothercare and Pamela Scott. The centre has a somewhat dated environment.

5.2.19 Planning permission was granted by An Bord Pleanala on the 11th November 2008 for a mixed use development includes 47 no. retail units, including 3 no. anchor units, with a total gross floor area of 18,109 sq. m, a 107 no. bedroom hotel, 28 no. residential units, 13 no. commercial / office units, an exhibition / community space, a sports bar and bowling centre, a food court, a roof garden with open space and an urban park on a site bounded by Wyse Park, Browns Lane, John's Lane, Castle Street and New Street. The development known as 'Newgate' is not yet constructed and in the current fiscal environment, its future is somewhat uncertain. If constructed however, the development would be a significant retail attraction in the City.

5.2.20 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.

Image 5.12: City Square Shopping Centre

Images 5.13 - 5.15: John Roberts Square (above, top and top right)

Image 5.16: Waterford Train Station

5.2.21 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 new Storm cinema has opened in the Railway Square area which is also a welcome addition to the City. However, the Patrick Street Cinema has closed. There are also a number of night clubs, particularly around Parnell Street/John Street Intersection.

5.22 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.

5.3 ACCESSIBILITY

5.3.1 Waterford City centre is highly accessible to the public. 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. Services are provided to Dublin and Limerick.

5.3.2 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.

5.3.3 Over the last number of years the road network in Waterford has improved greatly. The City is connected to Cork, Dublin, Kilkenny, Dungarvan, Limerick, Wexford, Rosslare Europort, Clonmel and Tramore . In 2009 the N25 Waterford City Bypass opened. The route consists of 23 km of High Quality Dual Carraigeway as well as 14 km of single carraigeway and a second crossing over the River Suir.

5.3.4 In March 2010, a section of the M9 opened as part of the new Motorway linking Waterford with Dublin. The final section between Carlow and Knocktopher was opened in September 2010, which completed construction of the 116.5km route. As a result of this improved infrastructure, journey times have been cut between Waterford City and Kilkenny, Carlow and Dublin.

5.3.5 In 2007, the R710 outer ring road opened. The road is a dual-carriageway which connects Ardkeen with the Butlerstown Roundabout which connects to all major primary routes from Waterford. The main airport road is also connected. The R709 forms the Inner Ring Road around the south of the inner city.

5.3.6 The delivery of the City By-Pass has resulted in a much improved traffic environment in the City Centre, particularly on the South City Quays. However, whilst that 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."*

5.3.7 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 town 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, Arundel Square is dominated by vehicular traffic and at the Railway Square development (TK Maxx) there are different levels and steps to negotiate which create a somewhat poor pedestrian environment (Images 5.19 and 5.20).

5.3.8 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


Images 5.17 and 5.18: High Quality Paving and Good Pedestrian Environment


Images 5.19 and 5.20: Poor Pedestrian Environment—Railway Square and Arundel Square

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 are to investigate the feasibility of developing underground car parking instead of surface provision along the Quays.

5.3.9 There is disconnect between the City Quays and the central shopping area. Pedestrian crossing points are limited and there is scope for enhancing linkages and traffic calming to improve the pedestrian experience.

5.3.10 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 further 630 car parking spaces are permitted in the Newgate scheme.

5.3.11 There is limited accessibility for cyclists in the City. There are few cycle tracks within the City area and limited bicycle parking provision. The City Council has installed some bicycle parking provision on the quay, at John Roberts Square and Arundel Square (Images 5.21 and 5.22). At the time of survey, this parking was poorly utilised, perhaps due to their unconventional design. It is understood that the Council intend to develop further cycle paths in the City Centre including along the City Quays as part of their green route strategy.

5.3.12 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. Overall pedestrian accessibility to the City is good, with good quality paving, dished curbs and a good quality public realm. There is room for improvement however, and there are areas of the City that would benefit from enhanced environmental works to improve the pedestrian environment, most notably the City Quays. Cycling facilities in the City are poor and those provided are poorly utilised.

Images 5.21 and 5.22: Cycle Parking in the City

5.4 ENVIRONMENTAL QUALITY / AMENITY

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 (Images 5.23 and 5.24).

Images 5.23 and 5.24: Derelict Vacant Structures in the City

5.4.2 There are also a number of underutilised and poorly maintained backland areas that have significant potential for redevelopment (Images 5.25 and 5.26).

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 (Images 5.27 and 5.28). There are nonetheless some examples of poor shop front design on the principle streets (Image 5.29).

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 there is a need to ensure ongoing maintenance and improvement of these areas. Furthermore, there


Images 5.25 and 5.26: Backland Sites with Potential for Redevelopment

Images 5.27 and 5.28: Traditional Shop Front Fascia

Images 5.29: Poor Shop Front Presentation—John Roberts Square

are 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. 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 in recent years from tax designated development with a significant new commercial and residential scheme constructed around Railway Square. There have also been new developments on Patrick Street. The success of these schemes has been varied with high vacancy rates prevalent.

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 and accommodates the significant anchors of Mothercare, Boots and Pamela Scott.

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.

5.4.9 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.

5.5 DIVERSITY OF USES

5.5.1 Waterford City Centre accommodates a wide range of functions, retailers and retail services. A number of independent retailers such as Fitzgeralds, the Waterford Book Centre and Kneisel Jewellers as well as a number of well known national and international multiples such as Pamela Scott, Monsoon, Clarkes, Shoe Zone, Boots, Debenhams 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 takeway 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 begun to decline and erode. There is increasing vacancy in this area. However, a worrying trend is also the appearance of a number of lower order retail and retail service outlets in these areas. Such uses in the prime retail areas can detract from the retail ambience and discourage higher order retailers from locating in the City.

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. A new craft incubator unit has opened on Peter Street (Image 5.30). 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.

Image 5.30: New Incubator Craft Unit

5.5.6 There are two department stores in the City – Debenhams and Shaws as well as a Dunnes Stores. 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, the Gap and H and M. It is also noted that many of the high street retailers that are represented occupy a smaller floor Image 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 two shopping centres have a high level of occupancy. Both have a good representation of multiple retailers and comparison operators.

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. 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 Image of between 1,000 and 1,999 sq. metres. In this regard, the City has failed to attract new retail formats like the British Multiples/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 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 principle prime pitch retail streets to maintain the primary retail role and function of these streets.

5.6 MULTIPLE REPRESENTATION

5.6.1 There is a reasonable degree of multiple representation in the City with a number of well known brands represented on the main shopping streets. However, whilst there is a good range of multiples 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 Gateway Cities such as Cork and Limerick where higher order retailing predominate. Cork in particular has been able to attract some major high street fashion names with the opening 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,

Images 5.31 and 5.32: Independent Retailer Representation

Image 5.33: Independent Food Retailer, Michael Street

Image 5.34: Independent Food Retailer, South Quays

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 not in the City but represented in the remainder of Ireland confirms a lack 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 within Debenhams including such brands as Oasis and Top Shop. 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 independent 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.

Images 5.35 and 5.36: Multiple Representation in the City

5.7 RATES OF VACANCY

5.7.1 At the time of the qualitative survey, the rates of vacancy and dereliction within the city centre were generally low. It was noted however, that there were three significant vacant properties in the prime retail area with further vacancies in the peripheral streets as well.

Image 5.37: Vacant Site, Patrick Street

5.7.2 The City Centre Report carried out in 2009 contained a vacancy survey. This noted that there are a number of areas which constitute vacant buildings/sites. It noted that concentrations of poor building presentation in prime pitch areas of the City Centre detract from the environment and can send out the wrong signals to developers. The rates of vacancy were estimated to be approximately 8.5%.

5.7.3 Higher rates of vacancy were noted on the more peripheral streets such as Patrick Street (Image 5.37) and O' Connell Street. As noted in section 5.3, there are also a number of obsolete backland areas that have potential for significant redevelopment such as the Broad Street cinema site and backland car parking area around Jenkins Lane.

5.7.4 The Newgate site also contains a number of derelict and obsolete buildings and structures. Although much of the site is not clearly visible from the prime retail pitch, it is clearly significant that such a major brownfield site within the city core remains undeveloped.

5.8 WATERFORD HEALTH CHECK CONCLUSION

5.8.1 Waterford has an attractive and vibrant City Centre. The principle shopping streets have a pleasant shopping environment with good shop

Images 5.38 and 5.39: Vacant Units in Prime Retail Area

Images 5.40 and 5.41: Vacant Units in Peripheral Retail Street

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.

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 backland 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. The City will also host the Tall Ships Race this year. 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 There is also scope for 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 Arundel Square in particular have scope for improvements in the pedestrian environment through the limitation of on street car parking and enhanced hard and soft landscaping. Ongoing litter management and regular and consistent street cleaning and maintenance are priority actions. Cycling facilities in the City are poor. The Council is investing in the green routes initiative and enhanced cycle paths and parking provision should be a priority.

5.8.7 It is clear from the qualitative study that whilst Waterford has in general a good array of multiple representation, the City does not have the level of such retailer representation compared to other gateway Cities such as Limerick and Cork. Waterford is underperforming in this regard and its retail profile is not commensurate with its status as a Gateway 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 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 Gateway City. 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.

5.9 WATERFORD CITY SUBURBAN DISTRICT CENTRES

5.9.1 The City Development Plan identifies 4 district centres in the City:

1. Ardkeen/Farronshoneem
2. Lisduggan
3. The Inner Relief Road/Tramore
4. Abbeylands (in the northern environs of Waterford City, in Co. Kilkenny).

5.9.2 Each of these is discussed in details below. In addition this study identifies a fifth centre at the Caufields Hypercentre, Morgan Street.

5.10 ARDKEEN / FARRONSHONEEN

5.10.1 Ardkeen, is located to the east of the City Centre on the Dunmore East Road approximately 2 km from the City. It is a busy and active District Centre anchored by the Ardkeen Quality Foodstore. The centre also includes a wide range of other local shops, services and facilities including café, drycleaners, health food shop, chartbusters, , post office, butcher, florist, juice shop, off licence, pharmacy, bank, jewellers, boutique and medical centre. The centre also accommodates a public library. A Lidl Discount Foodstore is located immediately adjacent to the centre.

5.10.2 The centre has a bright and airy internal environment and is well maintained. The external environment is well maintained and there is a generous provision of surface car parking. At the time of the survey the car park was very busy and congested.

5.10.3 The centre appears to be trading well and has no rates of vacancy and is active and vibrant. It is clearly a successful and popular district centre. There are also a number of other complementary retailing facilities in the vicinity of Ardkeen including the Lidl development and a further parade of local shops and facilities including Pizza Hut, Boyle Sports, Ladbrokes etc.

5.10.4 To the north of Adkeen at Farronshoneen there is a large Tesco Extra (Image 5.45). There are also a number of other retailers adjacent to this store including Next, Homebase and DID. The Tesco is served by extensive surface car parking. It is a relatively modern development with a well maintained internal and external environment.

Images 5.42 and 5.43: Ardkeen

Image 5.44: Neighbourhood Shops at Ardkeen

Image 5.45: Tesco Farronshoneem

5.11 WATERFORD SHOPPING CENTRE, LISDUGGAN

5.11.1 This shopping centre is located approximately 5 km south west of Waterford City Centre at Lisduggan. The centre was opened in 1975 and although refurbished, still has a somewhat dated appearance. It is anchored by a Tesco store and a Heatons and accommodates a total of 28 retail units. There is a good range of shops and retail services including photographer, newsagent, boutiques, travel agent, butchers, café, vegetable shop, pharmacy, book shop, cleaners, food deli, hair salon, book shop, shoe shop sports shop etc. There was only 1 vacant unit at the time of the survey. The gross floor area of the development is 8,458 sq. metres. The development is served by 650 surface level car parking spaces. Adjacent to the centre is further commercial development including a pub and takeaway.

Images 5.46: Waterford Shopping Centre, Lisduggan

5.11.2 Overall the internal environment of the centre is adequate and facilities such as public toilets, public phones, shopper's seats and an ATM machine are provided. However, the external appearance of the centre is poor and in need of improvement. At the time of the survey there were low rates of vacancy. It appears to be a popular retail facility for local residents.

5.11.3 Planning permission was granted by An Bord Pleanala on the 3rd November 2006 for the redevelopment of Waterford Shopping Centre including new and revised access and egress.

5.11.4 The permission is for the phased reconstruction of the existing district shopping centre site to provide a development comprising of 20,178 sq. m. gross floor area of development over three levels. The redeveloped shopping centre provides for a total of 32 no units (including two no. anchor tenants, library, Bank of Ireland, TSB, two no. retail warehouses and three no. restaurants), ATM's, and the development of 907 car parking spaces at lower ground and ground floor level, a road link from Browns Road to Church Road, new and revised access and aggress provisions to Browns Road and Church Road, marshalling areas, service yards, landscaping, external signage, excavation and site development works, on lands between Church Road and Browns Road, Waterford.

5.11.5 Condition 2 of the planning permission required that the proposed main anchor unit (Tesco) shall be reduced in size so that its net retail floorspace shall not exceed 3,000 square metres. Condition 3 omits retail warehouse unit 23 from the permission. A condition also reduced the extent of comparison floorspace in the anchor unit. This permission has not been implemented. The redevelopment of the Waterford Shopping Centre would significantly enhance the retail offer and environment in this District Centre.

5.12 THE INNER RELIEF ROAD / TRAMORE ROAD

5.12.1 The Tramore Road is located to the south of the City Centre and accommodates a mix of comparison, convenience and bulky household retailing. The principle convenience retail development is the Kilbarry Centre. This shopping centre opened in October 2000 and is anchored by Superquinn. The centre also accommodates a limited range of other neighbourhood retail units and services including a pharmacy, newsagent, florist, drycleaner, hairdresser and coffee shop. The gross floor area of the development is 6,317 sq. metres and it is served by 470 surface level car parking spaces. The design and overall quality of retail provision is good with a pleasant internal and external environment.

5.12.2 There is also a Lidl Discount Foodstore on the Tramore Road and an Aldi Discount Foodstore on the Cork Road. A number of significant retail warehouse operators are also located at the Tramore Road including Tile Market, Woodies, Smyths, BTW and Petmania. There are also a number of light industrial units, builders providers, electrical wholesalers, car sales showrooms, tyre repairs and other construction related retailing represented here. Retailing at the Tramore Road primarily caters for car borne traffic. It is a quasi commercial/retail zone and lacks a defined centre.

5.13 ABBEYLANDS, KILKENNY

5.13.1 Planning permission was granted by Kilkenny County Council on the 1st November 2007 for amendments to the previously permitted mixed-use district centre scheme (Kilkenny County Council Reg. Reg. 05/1287 and Kilkenny County Council Reg. Ref. 06/2010) on a site of 3.47 hectares bounded to the northwest by the New Ross Road (N25); at Abbeylands, Ferrybank, Co. Kilkenny.

5.13.2 The permission approved the provision of additional floorspace and incorporated the redistribution and change of use of some permitted floor space at ground, first, second and third floor levels, respectively, together with ancillary works, and included the addition of an infill mixed-use block to link permitted building no.'s 1 and 2. Associated amendments included the option, if required, to increase the number of car parking spaces by an additional 237 no. at grade level on the enlarged site area.

5.13.3 The gross floor area of the scheme increased by 3,406 sq. m. (from 30,883 sq. m. permitted under Reg. Ref. 06/2010 to 34,289 sq. m.), with the floorspace of the permitted convenience and comparison, retail floorspace, retail warehousing, health and beauty, medical centre, gym and management suite not affected by this proposal. The permission effectively increased the floorspace of the office, crèche, food court, motor sales area elements and decreased the number of permitted live work units and the size of the permitted restaurant.

5.13.4 The Abbeylands development has been constructed and is called the Ferrybank Centre. It is a significant modern retail development in the northern environs of the City. However, the centre is currently vacant and has never been occupied or opened for trading.

Image 5.47: Ferrybank Shopping Centre, Kilkenny

5.13.5 It is noted that the Ferrybank/Belview Local Area Plan (2009) has designated Ferrybank Abbeylands SC as a 'Gateway Suburban Centre' a level above District Centre as per the hierarchy set out in the Retail Planning Guidelines. Gateway Suburban Centre is not defined in the Retail Planning Guidelines and this designation is not in accordance with the hierarchical definitions as set out in the RPG's. In this regard, Ferrybank should be considered as a District Centre. It is detailed that the centre is permitted to expand its level 2 type comparison retail component by a further 3,000 sq. metres. Such an expansion is inappropriate in the context of the level of retail floorspace already permitted at the centre and the relationship of the Centre to Waterford City Centre.

5.13.6 It is considered that the designation set out in the Ferrybank-Belview LAP is inappropriate in the context of the retail hierarchy of Waterford City and the extent of retail floorspace already permitted at Ferrybank. It is considered that Ferrybank is already of an appropriate scale in terms of its position in the hierarchy as a district centre and the further development of comparison floorspace at this location would be detrimental to the vitality and viability of the City Centre and its primacy in the region. In this regard there should be a presumption against the further development of comparison floorspace at Ferrybank.

5.14 CAUFIELDS HYPERCENTRE

5.14.1 This shopping facility is located in close proximity to the City Centre. Originally constructed in 1983, the centre was refurbished in 2000. The development is anchored by Supervalu as well as a number of other retail units including Heatons, TSB Bank, hair salon, travel agency, pharmacy and café. The gross floor area of the development is 8,361 sq metres. It is served by 300 surface level car parking spaces.

5.14.2 The centre has limited public facilities. The external environment of the centre has clearly been improved in recent years, however, the internal environment is dated and lacks natural light. The centre has potential for further redevelopment and regeneration. In this context its designation in the retail hierarchy should be considered. It is proposed that the Hypercentre is designated as a District Centre.

Image 5.48: Caufield Hypercentre

5.15 SUBURBAN CENTRES CONCLUSION

5.15.1 The City is well served by District Shopping Centres. The majority are dominated by convenience retailing with associated and complementary neighbourhood scale retail shopping facilities and essential day to day retail services. The quality of the centres varies. The majority are in good condition and are trading well. Lisduggan has a dated retail environment, but this does not seem to have detracted from the vitality of the centre as vacancy rates are low and the centre was busy and active at the time of the survey.

5.15.2 The Tramore Road is a quasi commercial/retail area and the area lacks a defined core or centre. Greater cohesion could be provided for this area in terms of stricter controls regarding signage, lighting etc.

5.15.3 The City is well served in terms of bulky household provision. In addition to providing additional retail warehousing demand in existing and planned retail warehouse parks, retail warehouse provision can be met in the vicinity of the Tramore Road/Inner Relief Road which is also characterised by this type of development.

5.15.4 A significant retail scheme has been permitted to the north of the City in the administrative area of Kilkenny County Council. It is notable that this scheme is vacant at present and its future is uncertain. Notwithstanding the fact that this centre is outside the jurisdiction of the City Council, it essentially serves the catchment area of Waterford City and communities to the north of the River Suir. The continued development and expansion of this centre would pose a threat to the continued vitality and viability of Waterford City Centre.

5.15.5 Existing district centres in the City have not followed the trend of other district centres in other parts of the country which have come under pressure to redevelop in recent years and develop much more extensive retail, retail service and leisure facilities. For example planning permission has been granted at Ballymun SC and Northside SC (both designated district centres) in Dublin for large scale mixed use schemes including significant levels of comparison floorspace, bringing the net retail floor area of such centres well in excess of 20,000 sq. metres. In addition development proposals for these centres include further extensive retail services, leisure uses, office and residential development. Larger scale district centres have been developed at Mahon and Douglas in Cork and there are proposals to redevelop the Wilton District Centre. It is likely that such similar schemes were not progressed in Waterford due to the relatively limited size of the City, its catchment area and the development control affected by the Planning Authority. It is appropriate that district centres in Waterford should be more limited in scale than the much larger urban area such as Cork and Dublin.

5.15.6 It is clear however, that there has been pressure to develop comparison floorspace in the district centres. An Bord Pleanala have been restrictive in permitting such schemes and it is notable that permission was refused for the development of a large comparison unit at Farronshoneen and the extent of comparison floorspace in the redevelopment of Lisduggan was also strictly controlled. Furthermore, the first application for the Ferrybank scheme was refused by the Board due to concerns regarding the extent of comparison floorspace. In this context there should be a presumption against the development of further comparison floorspace at Ferrybank.

5.15.7 It will be important to maintain the existing district centres in Waterford City at an appropriate scale and level to ensure that the primacy of the City Centre is retained and to ensure that these centres provide a more localised and lower order shopping role for the City. In this regard, there should be a presumption against the development of higher order comparison facilities in the existing District Centres in the City. The Hypercentre at Morgan Street has obvious development potential and this should be promoted and encouraged.

5.16 WATERFORD CITY NEIGHBOURHOOD CENTRES

5.16.1 The city plan identifies 3 existing neighbourhood centres which include:

1. Cleaboy
2. Kilcohan
3. Ballinakill

and 3 proposed neighbourhood centres at

1. Knockboy
2. Carrickphierish
3. Ballybeg

5.16.2 In addition, another significant district centre has been constructed at Ross Abbey SC, Rathculliheen, Ferrybank (currently unoccupied) in the environs of the City (within the administrative area of Kilkenny County Council). Each of these are discussed in detail below:

Images 5.49 and 5.50: Cleaboy Neighbourhood Centre

5.17 CLEABOY NEIGHBOURHOOD CENTRE

5.17.1 Cleaboy neighbourhood centre is located to the west of the City and serves a large residential community as well as the Cleaboy Industrial Estate. The centre accommodates a range of retail services and shops typical of a neighbourhood centre. There is an anchor supermarket – Freshway and a range of other units including a takeaway, hair salon, pharmacy, Chinese takeaway, post office, public house and bookmakers. At the time of survey there was just 1 vacant unit.

5.17.2 The centre is served by surface car parking. The centre is generally well maintained but would benefit from improvements to hard and soft landscaping to improve its general appearance.

5.18 BALLINAKILL NEIGHBOURHOOD CENTRE

5.18.1 Ballinakill neighbourhood Centre is located to the south east of the City. It is an attractive neighbourhood centre anchored by a Londis Convenience Foodstore. The centre again includes the range of convenience and retail services typically found in a centre at this level of the hierarchy. Occupants include accountant, dentist, pharmacy, drycleaners, laundry, takeaway, café, boutique, household soft furnishing, bar and restaurant, shoe shop, hair salon, sport shop, fish and


Images 5.51 and 5.52: Ballinakill Neighbourhood Centre

chip shop etc. At the time of survey, the centre had just 1 vacant unit.

5.18.2 The centre has a pleasant environment and is well landscaped with a contemporary design.

5.19 KILCOHAN NEIGHBOURHOOD CENTRE

5.19.1 Kilcohan SC is located to the south of the City. The centre accommodates a basic range of neighbourhood retail facilities including a bookmakers, barbers, takeaway, off licence and public house and pharmacy. There is also a Spar convenience unit and a medical centre.

Image 5.53: Kilcohan Neighbourhood Centre

Image 5.54: Poor Boundary Treatment

5.19.2 The centre is served by surface car parking and would benefit from improved hard and soft landscaping. Some of the shop units have a degraded appearance. Boundary treatment is poor comprising palisade fencing (Image 5.53).

5.19.3 There is an extant permission on the existing Salvage Shop site on the Airport Road for a neighbourhood centre development comprising 6 retail units. Having regard to the limited site area at the existing Kilcohan neighbourhood centre, it is considered appropriate to provide for additional neighbourhood centre expansion in the area. In this regard the existing Salvage Shop site off Airport Road can accommodate any future local service needs of the immediate area. Accordingly the General Business zoning thereon should be maintained and the site be classified as a joint neighbourhood centre for the area.

5.20 KNOCKBOY NEIGHBOURHOOD CENTRE

5.20.1 The proposed Knockboy Neighbourhood Centre is located to the south east of the City Centre. It is envisaged that the centre will serve the existing and proposed residential community in Knockboy and complement other community facilities in the vicinity including the church, school and scout hall. The centre is not yet constructed.

5.21 BALLYBEG NEIGHBOURHOOD CENTRE

5.21.1 Ballybeg Neighbourhood Centre is located to the southwest of the City. There are some existing local facilities including St. Saviours Church, Centra and a public house which play an important role in serving the needs of the local community. A new Tesco has been constructed and it is envisaged that it will serve a large area of residentially zoned lands to the east of the Ballybeg Link Road.

5.21.2 Planning permission was granted to Tesco Ireland Ltd. on the 4th July 2008 for the development of a single level foodstore (3,963m2 gross), to include floorspace (2,008m2 net); and non-food floorspace (551m2 net), incorporating an off-licence; ATM; ESB substation, and switchroom; and all ancillary areas including storage; unloading area; cage marshalling; sprinkler tank and pump house.

5.21.3 The development also included a separate mixed use building arranged over one and part two storeys providing 4 No. retail Units (585m2 gross);

Image 5.55: Tesco Ballybeg

Credit Union (201m2 gross); cafe (212m2 gross); Crèche (297.5m2 gross) and medical centre lobby (90m2 gross) at ground floor level; and medical centre with 15 No. consulting rooms (508m2 gross) at first floor level. The development will provide for a surface level car park of 516 no. car parking spaces.

5.21.4 The associated mixed use building has not been constructed . As detailed there are also a number of other neighbourhood facilities to the north of the Tesco development. There is disconnect between these existing facilities and the new Tesco Store. The Tesco store seems somewhat isolated from the surrounding residential communities. Ballybeg would benefit from the development of further neighbourhood facilities and shops to provide a better range of neighbourhood shops and retail services to the surrounding community.

5.22 CARRICKPHIERISH NEIGHBOURHOOD CENTRE

5.22.1 Carrickphierish is a neighbourhood centre located to the west of the City Centre. This is a newly developing residential area with some incomplete residential estates and apartments.

5.22.2 Planning permission was granted by An Bord Pleanala (Reg. Ref: 07/355 / An Bord Pleanala Ref: PL31.227598) on the 19th August 2008 for a mixed-use retail/residential development including 129 no. residential units, medical centre, leisure centre, 2 no. additional public roads and all associated site works at Carrickphierish Road, Bawndaw, Gracedieu, Waterford. The application as approved includes 10 no. retail units of approximately 987 sq. m. gross floorspace and a food anchor store (net retail area: - 1,606 square metres, gross 2,195 sq. m).

5.22.3 Permission has also been granted under reg. ref. 10/168 for a further retail and mixed development comprising: a part 3 storey, part 2 storey neighbourhood centre having an anchor convenience unit, 6 retail service units, a gymnasium and 5 apartments (b) a 2 storey medical centre including a pharmacy (c) a part 3 storey, part 2 storey nursing home (d) 8 single storey independent living units in two blocks.

5.22.4 Within the development, the anchor convenience store had a net retail floor area of 1,123 sq. metres. The retail development in its entirety had a net retail floor area of 2,219 sq. metres.

5.22.5 Neither of the developments have been constructed. Given the extent of undeveloped land in the vicinity of these proposed neighbourhood centres, the timescale for their development and completion is uncertain.

5.23 ROSS ABBEY SHOPPING CENTRE, FERRYBANK RATHCULLIHEEN, KILKENNY

5.23.1 The Ross Abbey Shopping Centre is located within the Waterford City Environs. It is bound to the north by a disused railway line, to the west by open fields, to the south by the Ferrybank – Rathculliheen Road (LP3413). Abbeylands Business Park is located to the south west of the site and the Abbey Park Residential Estate is located on the opposite side of the LP3413.

5.23.2 A final grant of planning permission (application reference: 06/2196) was granted by Kilkenny County Council to Noel Burke Developments on the 17th April 2010 for the construction of a two storey neighbourhood centre consisting of 6 no. retail units including a food anchor store, 3 no. non-retail service units, a take-away, 2 no. leisure units, a bar with basement storage, restaurant, betting office, pavilion café, car park, service yard, totem signage, and associated site works. The development provided for a neighbourhood centre with a gross floor area of 4,849 sq. m.

Image 5.56: Ross Abbey Shopping Centre

5.23.3 Under Reg. Ref: 07/2213, permission was approved for an increase in the floor area of the neighbourhood centre from 4,849 sq. m to 5,073 sq. m.

5.23.3 The neighbourhood centre itself comprises 19 no. units, including 1 no. anchor unit. Other uses (according to the planning history) include 4 no. retail units, 4 no. non-retail service units, 1 no. public house, 3 no. restaurants, 3 no. units comprising gym / leisure use, 1 no. take-away and 1 no. betting office. The development has been completed but is unoccupied. The centre is designed to a high standard.

5.24 CONCLUSION

5.24.1 There are four existing dedicated neighbourhood centres serving the Waterford City suburbs. An additional centre has developed to the north of the City in the administrative area of Kilkenny County Council. All are generally successful centres with good occupancy (with the exception of the Ross Abbey centre which is vacant), although Ballybeg would benefit from the development of further small scale localised retail facilities and services in time in order to compliment the existing neighbourhood facilities, enhance the retail offer and provide a better range of local retailing for its catchment area. The future of Knockboy and Carrickphierish neighbourhood centres are uncertain and it is envisaged that the permitted applications at Carrickphierish may in time be scaled back to provide more modest facilities at these locations. Their development is likely to be dependant on the viability of future residential development in their vicinity.

5.24.2 Neighbourhood centres play an important role in providing day to day and top up retail facilities for the local catchment. They are particularly important facilities for the elderly, disabled and those without access to a car. In this regard, the development of further small scale neighbourhood centres should be promoted as appropriate. Such local shopping facilities are also important in providing day to day facilities for the employees of large industrial or employment zones and in this regard, proposals for small scale neighbourhood centres which include a modest convenience shop and ancillary retail units and facilities such as café/ sandwich bar should be considered favourably.

5.24.3 The existing centres of Cleaboy and Kilcohan would benefit from enhanced hard and soft landscaping and general improvements to their public realm and boundary treatment.

5.25 RETAIL WAREHOUSE DEVELOPMENT IN WATERFORD

5.25.1 The City Development Plan identifies that three sites have been designated for the development of retail warehouse development:

1. Site at Six Cross Road
2. Site at the Airport Road
3. Site on the Cork Road

5.25.2 In addition a significant retail warehouse park has been developed at Buttlerstown (in the administrative area of Waterford County Council). Each of these is discussed further below.

Images 5.57 and 5.58: Butlerstown Retail Park

5.26 BUTLERSTOWN RETAIL PARK

5.26.1 The Buttlerstown Site is bounded by the N25 Cork Road to the south and the Outer Ring Road to the West. It is located within the administrative area of Waterford County Council. The development accommodates a significant retail warehouse park that is anchored by B and Q. The park also accommodates Harvey Norman, Home Focus and Halfords. The park is served by extensive car parking.

5.27 SITE AT SIX CROSS ROAD—WATERFORD RETAIL PARK

5.27.1 Planning permission was granted by Waterford City Council in 2005 for a development comprising the construction of Retail Warehouse Park (total gross floor area 10,512.5 sq. m.) comprising 7 No. Retail Warehouse Units including a garden centre and 405 No. surface car parking spaces, the reservation of a site for a future family restaurant, landscaping & ancillary site development works with vehicular access from Kilbarry Road all on a 3.88 hectare site.

5.27.2 Permission was subsequently granted in 2008 comprising of alterations and additions to an existing retail warehouse development consisting of the sub-division of the 4,434 sq. m. unit 1 into two retail units of 1,575 sq. m. and 2,859 sq. m and the omission of previously approved mezzanines to Unit 1.

5.27.3 The development has been constructed but is currently vacant. It is of a

Images 5.59 and 5.60: Waterford Retail Park

high quality design and has excellent accessibility.

5.28 SITE AT THE CORK ROAD

5.28.1 Planning permission was granted by An Bord Pleanala on the 12th June 2008 for a mixed use development of 36,556.5 sq. m. gross floor area on a 6.55 ha. site within an 8.9 ha. overall site to be developed as phase 1 of a two phase development. The development included:
Block C: comprising of 5 No. retail warehouse units with mezzanine retail spaces with office space overhead with a total floor area of 9,305 sq. m. with the retail warehousing units comprising a total area of 6,315 sq. m. and a total office floor area of 2,990 sq. m. and

Block F: comprising an anchor retail warehouse covering an area of 6,238 sq. m. incorporating a main retail floor, offices/ancillary spaces, covered builders yard, service yard and garden centre.

5.28.2 Other elements of the proposal include a conference centre, hotel, clinic and over 750 car parking spaces. Access to the development site was proposed from the Cork Road (N25) via a signaled controlled T-junction, located immediately to the east of Waterford Crystal Sports & Leisure Centre.

5.28.3 Construction has not commenced on this development.

5.29 SITE AT THE AIRPORT ROAD

5.29.1 Planning permission was granted by An Bord Pleanala (Reg. Ref: 06/415 / An Bord Pleanala Ref: PL31.224958) on the 18th March 2008 for a mixed use leisure and retail development including 5 no. retail units, cinema with ancillary bar and restaurant, car parking, access roads and all associated site works on a circa 13 hectare site to the east of the R708 Airport Road close to its junction with the Outer Ring Road at Williamstown, Waterford.

5.29.2 The permission is for Phase One of a larger development and includes 1 no. DIY unit measuring 5,970 square metres gross (including 1 no. outdoor garden centre of 1,170 square metres); 4 no. retail warehouse units totalling 6,430 square metres gross; 12 no. screen cinema accommodating 1,500 number seats and measuring 8,100 square metres, including ancillary bar and restaurant; 483 no car parking spaces and 96 no. bicycle parking spaces. Two access points off the R708 Airport Road were proposed.

5.29.3 Development has not commenced on this proposal.

5.30 CONCLUSIONS

5.30 It is clear that Waterford is well served by retail warehouse development. The Buttlerstown Retail Park is the only fully developed retail park in Waterford, but is not fully occupied. A further park is developed and unoccupied and extant permissions exist for a further two ambitious retail warehouse and mixed use developments. In addition there is further ad-hoc retail warehouse development located at the Tramore Road and also at Farronshoneen where the likes of DID and Homebase are represented. In the current economic environment it is unclear whether schemes such as that proposed at the Airport Road or Cork Road will be progressed and there is a possibility that these permitted schemes may need to be modified for more modest schemes.


Images 5.61 and 5.62: TK Maxx and Poleberry Shopping Centre


Images 5.63 and 5.694 Ballybricken

5.31 OTHER RETAIL DEVELOPMENTS IN THE CITY

5.31.1 There is one further retail scheme of note in the City, although it is not given specific designation in the City Plan. This is:

1. Poleberry.

5.31.2 In addition there is the unique retailing area of Ballybricken.

5.31.2 These are discussed in further detail below:

5.32 POLEBERRY—TESCO SHOPPING CENTRE

5.32.1 This shopping centre is located on the edge of Waterford City Centre. It was opened in 1995 and accommodates a large Tesco store of over 3,000 sq metres. The gross floor area of the centres is 4,691 sq. metres and it is served by 370 surface level spaces.

5.32.3 The centre has become more integrated with the City Centre since the redevelopment of the Railway Square development which is anchored by TK Maxx.

5.33 BALLYBRICKEN

5.33.1 Ballybricken is a unique retailing area to the west of the City. It comprises a range of independent shop units clustered around a green space and band stand. There are a wide variety of day to day retail facilities and services represented including pharmacy, hair salon, takeaways, bars, xtravision, charity shop, bookmakers as well as some specialist units including a cake makers, outdoor sport specialist and Eastern European shop.

5.33.2 The area generally has high occupancy rates, with the exception of the large Londis unit which is currently vacant. In 2008, the City Council granted permission for a mixed use development on this site which included 4 retail units and residential development. This permission has not been implemented.

5.33.3 The Ballybricken area is served by an area of surface parking. This would benefit from some upgrading. The green and general area would benefit from some hard and soft landscaping enhancement works. Ballybricken is an attractive shopping area and clearly serves as a valuable local shopping facilities for residents of the area. Its role and function should be protected.

CHAPTER 6

ASSESSMENT OF COMPETING CENTRES

6.1 INTRODUCTION

6.1.1 This section of the Strategy provides an assessment of competing centres to Waterford. While the traditional competitor centres such as Wexford, Kilkenny, Tramore, Dungarvan, Carlow, Carrick-on-Suir, New Ross and Clonmel are examined as part of this review, it was felt that it was also pertinent to focus on the impact of major retail centres such as Cork and Dublin, which are considered to be competing centres due to their position on the retail hierarchy and the level and quantum of retail provision in these centres. These centres are also much more accessible to residents of the City since the opening of the M9.

6.1.2 The competing centres are discussed in order of their proximity to Waterford City, divided into regionally competing centres and nationally competing centres.

6.1.3 The baseline information used for the assessment of the competing centres includes published county retail strategies, site visits and in house reports.

6.1.4 Figure 1, which is an extract from Map 8 of the National Spatial Strategy, shows the relationship of the Gateway of Waterford with surrounding competing centres, such as Dungarvan, Clonmel, Carrick-on-Suir, New Ross and Wexford, and further to the north Kilkenny and beyond that Carlow. Linkages with Dublin to the north-east and Cork to the south-west are also apparent.

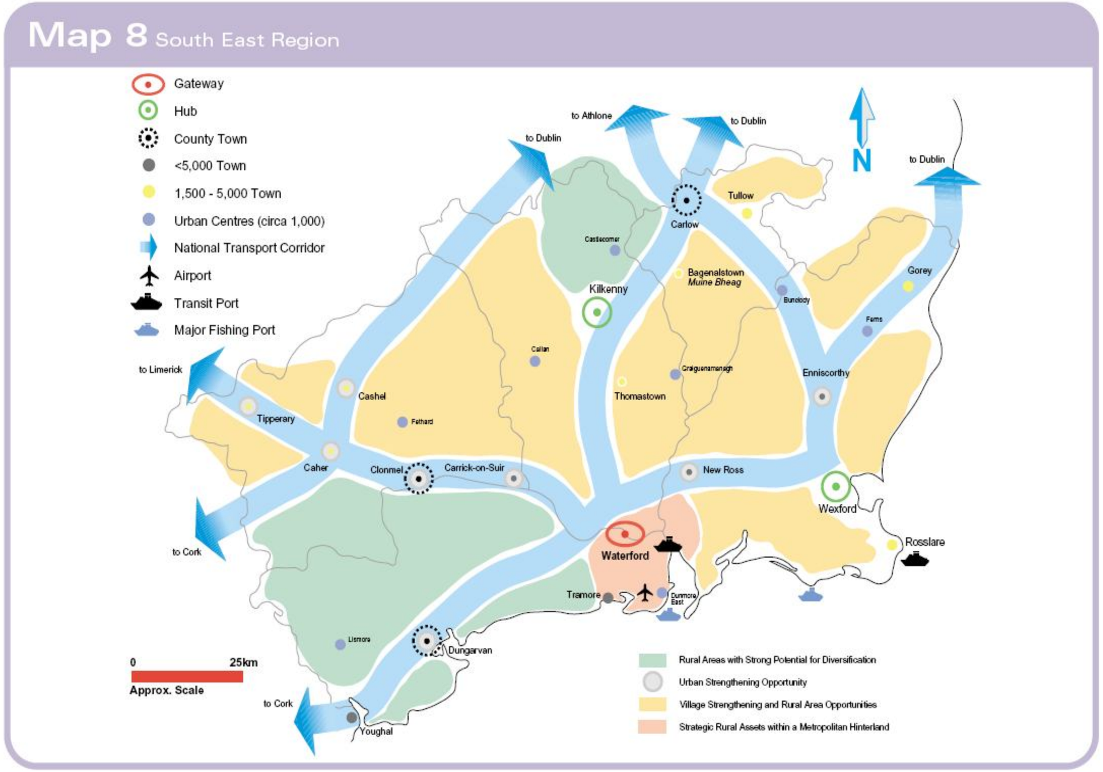


Figure 1: Extract from Map 8 of the National Spatial Strategy

6.2 REGIONALLY COMPETING CENTRES

Tramore

Introduction

6.2.1 Tramore occupies a coastal location adjacent Tramore Bay, approximately 13 kilometres to the south of Waterford City and 48 kilometres to the east of Dungarvan. The town is an established seaside resort for the South East Region with good transport linkages to Waterford City and Waterford Airport.

6.2.2 Tramore occupies a position at Level 2 'Sub County Town' of the County Retail Hierarchy. It is identified as a secondary service centre in the Waterford County Development Plan 2011 – 2017, due to it's population of 9,634 (2006). The purpose of the secondary service centres is to support the development of the gateway of Waterford City.

6.2.3 Population in the town is expected to increase to 10,924 by 2017. In terms of population, Tramore is the largest urban settlement in the County, not including Waterford City. Tramore is influenced by its proximity to Waterford City and its status as a dormitory town for people working in the City and surrounding area.

6.2.4 Tramore's tourism importance is evident from the range of tourism infrastructure that prevails which includes: hotels; bed and breakfasts/ guest houses; several holiday home developments; a caravan park; bars; restaurants/cafés; and, takeaways outlets. For a town of its size, it has a limited employment base and a high level of commuting to jobs in the Waterford conurbation.

6.2.5 The only sizeable employment location is the Riverstown Industrial Park. It has a good range of local services including national schools, 2 secondary schools, Garda station, fire station, library, banks, health board clinic and a variety of professional services.

6.2.6 Tramore's tourism function means that much of its services and facilities have increased demand on a seasonal basis.

Accessibility

6.2.7 Road access to Tramore is primarily via the R675 Regional Road, ultimately linking with Waterford to the north, and with Dungarvan via the coast to the west.

6.2.8 Plentiful car parking is available along the promenade with additional capacity available further to the east adjacent to the beach, with pay and display in operation during the high season months only (June – August). The main car park in the town centre serves SuperValu and close by there is a smaller car park on Priests Road.

6.2.9 Tramore has a relatively good Bus Éireann service with over 20 departures to Waterford City daily and this provides links to other parts of the country. There is no access by rail.

6.2.10 Whilst pedestrian accessibility is good along the Strand and surrounding areas, pedestrian accessibility to the retail area further to the north is hindered by a steep ascent, poor footpaths and on-street parking.

Retail Facilities

6.2.11 The Tramore Local Area Plan 2007 – 2013 describes that in the past Tramore has performed relatively poorly in terms of retail development. This is largely due to proximity to the larger retail centres in Waterford City, and may also be attributed to its role as a tourism destination and the associated seasonal demand that this creates.

Image 6.1: Tramore Strand—Leisure Uses

6.2.12 Tramore has a limited main retail area centred on Main Street, Summerhill Centre and Priests Road, with shops interspersed with bars, restaurants, cafes and other non retail services. The dominant characteristic of the town is the seafront and leisure park area (Image 6.1) which while busy in the summer are largely dormant at other times of the year.

6.2.13 Comparison floorspace comprises several small clothes shops and boutiques, a shoe shop, pharmacies, a hardware store, a health food store and small furniture shops (Images 6.2 and 6.3 overleaf – Main

Images 6.2 & 6.3: Tramore Main Street

Image 6.4: Supervalu on Main Street, Tramore

Street Tramore).

6.2.14 The main convenience floorspace in the town centre is SuperValu on Main Street (Image 6.4 overleaf), and also Tesco in the Summerhill Centre on the western edge of the town. Whilst a Londis was previously located in the town centre, this unit is now occupied by Xtra-Vision. A Lidl discount foodstore is located on the outskirts of the town at Ballycanane in the western suburbs of the town. A Spar store is in Riverstown, located outside the town centre. The Summerhill Centre to the north-west of the town includes Tesco, a medical centre, a jewellers, a pharmacy, and a Bank of Ireland outlet.

6.2.15 Tourist based retailing is primarily centred along Strand Road and the western end of the promenade and includes gift shops, light clothing stores and beach accessories.

Conclusion

6.2.16 Retailing in Tramore is limited primarily to convenience retailing to serve local needs, in addition to the needs of tourists. This reflects both its proximity to Waterford City and Dungarvan, both of which are larger centres offering a range of comparison and convenience outlets, its function as a secondary service centre, and its tourism function.

6.2.17 The retail provision in Tramore is related to its proximity to the Gateway of Waterford. In this regard, Tramore is not seen as a major competitor to the City as it serves a primarily local retailing role.

New Ross

Introduction

6.2.18 New Ross is the third largest town in County Wexford. New Ross town has a high quality physical setting and natural environment. The main streets are enclosed by three and four storey buildings traditional in form and plot widths.

6.2.19 The Retail Planning Guidelines classifies New Ross town as a third tier level 2 (sub-regional) shopping location. New Ross (along with Enniscorthy) is identified within the NSS as an 'Urban Strengthening Opportunity' located along a strategic National Transport Corridor linking Dublin to Waterford.

6.2.20 According to the NSS these designated towns have the potential to grow and their strengths should be capitalised on through, amongst other things, planning and development promotion activities.

6.2.21 New Ross is classified in the Retail Planning Guidelines as a Tier 3 Level 2 (sub-regional) centre and has a similar designation to that of Arklow, Athy, Dungarvan, and Enniscorthy. Tier 3 centres are described as providing important sub-regional retailing functions including the major national retailing chains.

6.2.22 In the Regional Planning Guidelines for the South-East Region 2010-2022, New Ross is identified as a Large Town which should continue to be an attractive location for new development.

Accessibility

6.2.23 New Ross is strategically located on the N25 and N30 national primary roads, approximately 36 kilometres to the west of Wexford Town and 23 kilometres to the north east of Waterford City.

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

6.2.25 The quays in New Ross are dominated by traffic and car parking and this is reflected by the absence of any significant retail facilities at this location (Image 6.5).

Image 6.5: New Ross Quays

Retail Facilities

6.2.26 In relation to retailing, the County Retail Strategy contained within the Wexford County Development Plan 2007 - 2013, notes that New Ross

Town serves as a retail and service centre for the south-west of County Wexford and the south-east of County Kilkenny.

6.2.27 New Ross however is described within the County Retail Strategy, as being 'significantly less vibrant' than the other main centres of Enniscorthy and Gorey with high vacancy rates along the secondary retail area on the periphery of the town centre. This can be largely attributed to its proximity and accessibility to higher order centres of Waterford City, Kilkenny City and Wexford Town. These vacancies are readily apparent, particularly on the peripheries of North and South Main Street (Images 6.6 and 6.7).

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

6.2.29 The town centre predominantly comprises independent retailers. In terms of convenience retail, this is provided in town centre locations largely by Super Valu on the Quay (Image 6.8 overleaf) and Spar on North Main Street, as well as a number of independent outlets. Aldi and Lidl both have stores on the edge of the town centre to the east. There are also a small number of specialist ethnic stores, such as Polskie Sklepy Galicja. Tesco have a store on the outskirts of the town contained within the New Ross Retail Park which is situated to the south east of the town centre.

6.2.30 Comparison shopping in the town centre is provided by specialised retailers. However, there is an obvious lack of large comparison national and international multiples. Retail dominates the ground floors of the buildings within the town centre, with upper floors generally comprising of a mixture of office and residential accommodation. Business and commerce are provided for including banks as well as a range of solicitors, accountants and auctioneers/estate agents' offices.

6.2.31 Woodbine Business Park which is located in close proximity to New Ross Retail Park near the intersection of the N30 and N25 National Primary Roads also contains a number of bulky good retailers .

6.2.32 As described in the New Ross Development Plan 2011 – 2017, the town centre has suffered significant amounts of dereliction and has a high rate of vacant buildings. This can be contributed in the main part to declining levels of activity, in particular retail, in the town centre.

Images 6.6 & 6.7: New Ross Main Street

6.2.33 Other key services located within the town include; a public library, a medical centre, dentist's surgery, an advice centre and a community enterprise centre which serve the local need. There are also a number of; restaurants, cafes, pharmacies, florists, ladies boutiques, health food shops, jewellers and gift shops situated in the town centre. These uses are also complemented by leisure uses, including a public park, a swimming pool, library, and St. Michael's Theatre (Image 6.9).

6.2.34 Across the River Barrow to the north west of the town centre at Rosbercon, a small number of mixed use developments have been constructed. A convenience store and limited number of local level services serve this immediate community. The ground floor units of a number of the mixed use developments are currently vacant with some unfinished to date.

Conclusion

6.2.35 In comparison retail terms, New Ross is unlikely to expand significantly in the medium term. The New Ross Development Plan 2011 – 2017 indicates that there is sufficient scope within New Ross to accommodate an additional foodstore (convenience) of 3,000 sq. m.

6.2.36 It is clarified in the Development Plan that there is no demand for additional comparison and bulky goods floor space when the current level of vacancy of existing stock is considered.

6.2.37 New Ross is likely to continue to develop to a limited extent to serve its surrounding community in a manner which seeks to improve the vitality and viability of the town centre.

6.2.38 In this regard, New Ross serves a local and limited regional role in retail terms, providing convenience retailing and limited comparison retailing for the local and surrounding communities. New Ross is relatively healthy in this role, although there is some vacancy.

6.3.39 New Ross is not seen as competition in retail terms to Waterford City, having regard to the greater range of retail facilities present in the latter and the role of New Ross in serving the local community.

Images 6.8: Supervalu in New Ross

Image 6.9: St. Michael's Theatre New Ross

Carrick-on-Suir

Introduction

6.2.40 Carrick on Suir is a market and commuter town, situated 24 km east of Clonmel and 26 km west of Waterford City. As set out in the Carrick-on-Suir Development Plan 2008, Carrick on Suir functions as a service and commuter centre serving east Tipperary and parts of County Waterford and Kilkenny.

6.2.41 The town itself had a population of 5,542 in 2006. The South Tipperary County Retail Strategy indicates that the population of Clonmel town accounts for almost 20% of the total County population, followed by Carrick-on-Suir and Tipperary town representing the next settlement tier with population percentages of 7.0% and 6.1% respectively.

Accessibility

6.2.42 The National Primary Road N24 traverses the town in an east-west direction while a number of regional roads lead to other large centres such as Kilkenny and Dungarvan. The town is also serviced by a rail link which connects to the national rail network in Waterford and Limerick Junction.

Retail Facilities

6.2.43 According to the Carrick-on-Suir Development Plan 2008, Main Street, West Gate, and Bridge Street No's 1-8 and 35-37 inclusive represent the core retail area of Carrick-on-Suir. The Development Plan describes that this area *"forms an attractive and sustainable mixed-use area which can provide all the benefits of urban living with shops, services, facilities and houses all within easy walking distance of each other".*

6.2.44 With regard to vacancy levels, the Retail Strategy describes that:

"Carrick-on-Suir has a relatively high (20.2%) vacancy rate among units in the PRA when compared with vacancy rates in the other main county towns, when this is coupled with the high percentage of use types (32%) that are not high value uses i.e. residential, bookmakers, auctioneers, this is indicative of a PRA that is under performing".

Image 6.10: Carrick-on-Suir Town Centre

6.2.45 This point is further stated in the Carrick-on-Suir Development Plan which states that:

"Despite the variety of commercial and retail uses in the town centre, problems of dereliction and more importantly vacancy are apparent in this area of the town. This is particularly evident on the upper floors of properties throughout the town. Within the town centre i.e. Main Street, West Gate and Sean Kelly Square circa 7% of all buildings are completely unoccupied, a further 2% have unoccupied ground floors, a further 18% have first floors unoccupied while a further 18% have second and third floors unoccupied. It was also found that 3.5 % of buildings were in a poor state of repair".

6.2.46 The vacancy levels in the town centre area readily apparent (see Image 6.11 overleaf). It is also highlighted that unit size in the prime retail area of Carrick-on-Suir is generally small and that this highlights a potential need for site amalgamation with the objective of forming larger retail units to attract high end retailers to the town.

6.2.47 In terms of existing retail floorspace, the County Retail Strategy indicates that Carrick-on-Suir has 3,374 sq. m. of convenience floorspace, 4,586 sq. m. of comparison floorspace, and 3,516 sq. m. of retail warehousing floorspace, providing a total of 11,476 sq. m. This places Carrick-on-Suir in fourth place in the County in terms of quantum of retail floorspace, behind Clonmel, Tipperary Town and Cashel. However, the percentage share of total retail floorspace located in Carrick-on-Suir has decreased from 10.6% to 9.2% between 2002 and 2006. In this regard, the County Retail Strategy notes that:

"This is indicates (sic) that Carrick-on-Suir is not retaining its competiveness in the County despite being the next largest settlement after Clonmel, and therefore, Carrick-on- Suir is now placed fourth as a county retail destination. However, the proximity of the Dovehill Shopping Centre to Carrick-on-Suir enhances the overall catchment offer associated with the town and the enhancement of linkages between Dovehill and Carrick-on-Suir has potential to strengthen the position of the town in the county retail hierarchy".

Image 6.11: Vacancies on Main Street Carrick-on-Suir

6.2.48 This development, to the east of the N24, was permitted in 2005 (Planning Reference: 04/823 Blarney Woollen Mills) at the site of the former Tipperary Crystal factory as part of an integrated tourism development with hotel and leisure centre (Planning Reference: 04/1614 Blarney Woollen Mills). Retail development was permitted as an ancillary element to a proposed hotel and leisure centre and comprises 5,700 sq. m. of comparison retail floorspace. This development is a retail attraction for visitors to the county and also caters for local shoppers within the county especially during peak seasonal shopping periods. Dovehill comprises approximately 10 amalgamated units with high end brand name stores and a large restaurant is also provided, making Dovehill a popular leisure destination. Retail largely comprises tourism leisure outlets such as Blarney Woollen Mills, Maison and Chateau Showrooms and Meadow and Byrne.

6.2.49 In terms of convenience floorspace, with only Supervalu (Image 6.12) and Aldi present in the town in 2009, the County Retail Strategy concludes that:

Image 6.12: Supervalu Carrick-on-Suir

"Carrick-on-Suir is under represented by brand names, especially, when compared with Tipperary Town. However, both Tesco and Lidl have expressed interest in locating in the Town".

6.2.50 The presence of Tinvane Retail Warehouse Park is also notable, a mixed use development comprising industrial units and four retail warehouse units (approx 3,000 sq. m.).

Conclusion

6.2.51 Carrick-on-Suir is under-represented by national and multinational convenience stores. According to the County Retail Strategy, the geographical proximity of Carrick-on-Suir to both Clonmel and Waterford City may attract retail trade away from the town.

6.2.52 The Dovehill Shopping Centre has attracted shoppers to the general catchment of Carrick-on-Suir. Despite this, Carrick-on-Suir has a relatively high level of vacancy in the prime retail area.

6.2.53 Retailing in the town centre generally lacks vibrancy. New development in the town centre has historically been inhibited by physical constraints, primarily the absence of larger floor plates, and this may be a factor in the absence of any significant retail facilities in the town centre.

6.2.54 In terms of competition with Waterford City, the function of Carrick-on-Suir is of a service town, and is therefore not comparable with the function of Waterford City in retail terms, particularly in comparison retail terms.

Dungarvan

Introduction

6.2.55 Dungarvan is identified as a Level 1: County Town Centre in the Waterford County Development Plan 2011 – 2017. Dungarvan is designated as a County Town in the National Spatial Strategy. The Regional Planning Guidelines recognise the pivotal role that the Town can play in the development of the Atlantic Gateway corridor between Cork and Waterford.

6.2.56 The County Development Plan outlines that Dungarvan experienced population increase during the last census period of 8.2%. The Regional Planning Guidelines for the South-East estimate that Dungarvan will grow from its current population of 8,362 (2006), to 11,600 in 2016 and 13,400 in 2022.

Accessibility

6.2.57 Dungarvan is located on the N25 national primary route, approximately 45 kilometres from Waterford City.

6.2.58 Pay and display parking is in operation with a car park located off Mary Street, south of Grattan Square. The Dungarvan Shopping Centre provides approximately 500 car parking spaces at surface and mutli-storey levels.

Retail Facilities

6.2.59 Dungarvan Town Centre is predominantly focused on the area around Grattan Square (Image 6.12 overleaf) at the busy intersection of O'Connell Street (Image 6.13), Mary Street (Image 6.14) and Parnell Street (otherwise known as Main Street (Image 6.15). The primary retail streets of O'Connell Street, Mary Street and Parnell Street radiate from Grattan Square. Grattan Square itself is dominated by traffic and car parking, with buildings on the Square primarily comprising of restaurant, café and financial services uses, interspersed with retail uses.

6.2.60 A public square leading ultimately to Dungarvan Shopping Centre is accessed from Grattan Square. A retail mall, containing outlets such as New Look and Carphone Warehouse, links the square adjacent to the Shopping Centre with O'Connell Street to the north.

6.2.61 In terms of retail provision, the Dungarvan Shopping Centre (Image 6.16) was opened in December 2004. It provides a wide range of shops including a supermarket (Dunnes Stores), butchers, restaurant, clothes shops, pharmacists, juice bar, bookshop, accessories shop and sport shops. A multi-screen cinema and entertainment centre has also been provided. The Dungarvan Shopping Centre has several national and international high street brands such as Dunnes Stores and Easons.


Image 6.13: Grattan Square, Dungarvan

Image 6.14: O'Connell Street, Dungarvan


Image 6.15: Mary Street, Dungarvan


Image 6.16: Parnell Street / Main Street, Dungarvan

Image 6.17: Dungarvan Shopping Centre

6.2.62 The development has added considerably to the car parking provision of the town. By integrally linking the development into Grattan Square and O'Connell Street, the Shopping centre has added to the vitality of the existing town centre. There has also been upgrading, extension and relocation of a number of other existing businesses within the town centre.

6.2.63 Outside of the shopping centre, high and middle order comparison shopping is limited with Shaw's being the main national multiple. Other comparison floorspace comprises independent retailers with several bulky goods retailers located out of the town centre adjacent to the N25 bypass at the Kilrush and Shandon roundabouts.

6.2.64 Convenience shopping largely comprises Dunnes Stores in the Dungarvan Shopping Centre and a number of smaller stores, including two SuperValu shops on Parnell Street and O'Connell Street and a large EuroSpar located just east of the Devonshire Bridge. Additional convenience shopping is provided by a variety of independent retailers located throughout the town centre and a number of smaller symbol group stores located in the town's suburbs.

6.2.65 The town is supported by a range of tourism, cultural and leisure uses, including the County Museum, a library and Market House Arts Centre (Image 6.18).

Conclusion

6.2.66 Dungarvan provides primarily a regional service centre, offering convenience retail and a limited range of comparison retail to serve local needs. Dungarvan is expected to grow over the coming years and there will be a requirement to ensure that retail provision is in place to provide for the needs of this increased population.

6.2.67 In relation to its function, Dungarvan performs relatively well and in accordance with its role as a County Town Centre. Vacancy levels appear to be low and Dungarvan town centre is considered to be healthy, and relatively attractive, notwithstanding the high levels of vehicular traffic permitted in town centre locations, particularly Grattan Square.

6.3.68 Notwithstanding the good range of retail provision in Dungarvan, it is not envisaged that the town will draw trade away from Waterford City. It is located a distance of circa 45 kilometres from Waterford City and offers a similar level of retail provision. However, it lacks an international dimension in terms of comparison retailing to compete with Waterford City in this regard.

Image 6.18: Arts Centre, Dungarvan

Clonmel

Introduction

6.2.69 Clonmel is the County Town of South Tipperary and has been designated a Tier 3 Level 1 (regional) Centre in the National Retail Hierarchy by the Retail Planning Guidelines. The Clonmel Town Development Plan 2008 categorises Clonmel as a regionally important centre. Clonmel is on a comparable level to key regional centres and county towns, such as Ennis, Kilkenny and Wexford.

6.2.70 The Retail Strategy for South Tipperary was adopted in March 2010. Clonmel is identified as being a Primary Service Centre and a Tier One County Town Centre in South Tipperary. It serves a catchment that extends across the entire county.

6.2.71 The Clonmel and Environs Development Plan 2008 notes that in 2006 there were 18,899 persons living in Clonmel and its environs, representing 23% of the total population of South Tipperary and reinforcing the importance of the town as the key urban centre of the County.

Accessibility

6.2.72 Clonmel is located on the N24, linking to Junction 10 of the M8 motorway. It is located approximately 52 kilometres from Kilkenny and 48 kilometres from Waterford. Clonmel railway station links the town with Waterford and Limerick Junction, from which connections can be made eastwards and to Dublin. Bus Eireann also operates national services in Clonmel.

Retail Facilities

6.2.73 The Retail Strategy states that Clonmel is well represented among with national and international large format convenience stores and identifies the core shopping area in Clonmel town centre as including O'Connell Street (Image 6.18), Gladstone Street, Mitchell Street (Image 6.19), Market Place (Image 6.20f) and Marystone Centre.

Image 6.19: O'Connell Street, Clonmel

Image 6.20: Mitchell Street, Clonmel

6.2.74 The central shopping area is based around the historic street pattern with a one-way system in operation. The historic core of the town has shaped the way in which the retail sector has evolved over time with few large purpose built units in the centre. Gladstone Street, O'Connell Street, Mitchell Street, Parnell Street and Market Place form the commercial core of the town. Both Market Place and Mitchell Street have been pedestrianised.

6.2.75 Other shopping streets include Upper Gladstone Street including Oakville Shopping Centre. There is relatively extensive vacancy apparent, for example on Upper Gladstone Street, the eastern end of O'Connell Street and in the Marystone Centre.

6.2.76 Notwithstanding the vacancy, Clonmel town centre is considered to be relatively healthy. In terms of convenience provision three national retailers are currently located in or on the edge of the town centre including Superquinn at Market Place, Marks & Spencer at the Showground's and Dunnes Stores at the Oakville Centre. Supervalu is also present at the Poppyfield Retail Park to the east of the town on the N24 and Tesco is also represented.

Image 6.21: Market Place, Clonmel

6.2.77 These stores are complemented by a variety of other small convenience shops including butchers, delicatessens, grocers, bakeries, newsagents and off licences. Aldi at Western Road, Dunnes Stores at Davis Road, Lidl at Davis Road and Tesco (24 hours) at Frank Drohan Road make up the convenience retail provision.

6.2.78 Comparison retail is primarily in the form of independent retailers focused on both town centre locations and in the recently opened Showground Shopping Centre, located in an edge of centre location on Davis Road to the east of the town.

6.2.79 The comparison sector is characterised by a number large comparison retailers, such as Penney's, Dunnes Stores, Heaton's, Toymaster and Eason's. Allied to the multiples are local traders retailing goods including ladies and gents fashion, household goods and sport equipment. Retail use dominates the town centre land use. The majority of this is used for comparison retailing. Vacancy is apparent in the town centre. There are number of vacant units, notably on Gladstone Street and Parnell Street.

6.2.80 The Showground Shopping Centre (Image 6.24) accommodates outlets such as Argos, Marks and Spencers, Golden Discs, Jack Jones and Pamela Scott. The Poppyfield Retail Park includes bulky goods outlet such as Woodies, Cost Plus Sofa and Harry Corry as well as Supervalu.

6.2.81 In addition to conventional retailing, the town centre provides a mix of other uses such as public houses, cafes and restaurants. Furthermore, there is a wide range of services in Clonmel including hairdressers, banks, estate agents, bookmakers and other office uses. Thus the town centre is an active and busy location both during the day and evenings.

6.2.82 The County Retail Strategy sets out the floorspace composition of the county and Clonmel. Clonmel dominates retailing in South Tipperary with over half of the entire county's floorspace (31,552 sq. m. (51.5%)) in the town and environs.

6.2.83 The Retail Strategy acknowledges opportunities for improved connectivity between the Showground's Shopping Centre and the town centre to develop a mutually beneficial synergy with the town. The Strategy also acknowledges that the vacancy rate in the Prime Retail Area (PRA) is the lowest among the main county towns. However, as described above, there is evidence of vacancy in the town centre.

Conclusion

6.2.84 Clonmel centre is vibrant with a range of independent and national operators, despite vacancies in the town centre. These vacancies may be attributable to recent edge of centre developments which are attracting trade away from the town centre.

6.2.85 Clonmel town centre does however remain attractive and has a considerable retail and commercial attraction in line with its role as a first tier centre and county town within the South Tipperary County Retail Strategy. The town centre appears to be vibrant and healthy.

6.2.86 In a similar manner to Dungarvan, Clonmel is located a relatively significant distance from Waterford City (circa 48 kilometres). The comparison retail market is more developed than that in Dungarvan, meaning that Clonmel is likely to compete better with Waterford City. Marks and Spencer is a significant attraction in Clonmel

6.2.87 Clonmel offers significant competition to Waterford City Centre. The opening of Marks and Spencers in Clonmel highlights the need for Waterford City to attract more leading anchor tenants.

Image 6.22: Showground Shopping Centre, Clonmel

Wexford

Introduction

6.2.88 Wexford Town is the administrative, retail and business capital of County Wexford. Wexford is classified as a third tier centre in the Retail Planning Guidelines for Planning Authorities 2012 and is the largest settlement in County Wexford.

6.2.89 The town is strategically located in the south of County Wexford on the N11 and N25 National Primary Routes and along the main Dublin to Rosslare Harbour railway line. Wexford is designated as a hub within the National Spatial Strategy in accordance with its strategic location close to Rosslare Port and on the national road and rail network. Wexford is located approximately 60 kilometres from Waterford City.

6.2.90 Wexford town had a population of 18,163 persons in 2006. The South East Regional Planning Guidelines 2010 – 2022 set a target population for Wexford town of 23,600 by 2016 and 26,700 by 2022.

Accessibility

6.2.91 In terms of accessibility, Wexford town centre has benefited from the town's bypass; however, there still remains a significant problem of traffic congestion and car parking in Wexford Town, particularly along the Quays. Traffic congestion and significant surface level parking on the Quays is reflected in the absence of any notable retail facilities along the Quays.

6.2.92 Main Street has benefited from a programme of works undertaken by the Borough Council to develop the street as a pedestrian zone. The Street now comprises relatively wide footpaths either side of a one-lane, one-way traffic system.

6.2.93 The railway station is well located in the centre of the town on Redmond Square. The service provides links to Dublin and Rosslare. Bus Éireann also provides frequent services from Wexford to Dublin and Waterford.

6.2.94 Wexford is relatively well served by car parking facilities. There are a number of car parks located along the Quays adjacent to Henrietta Street, Anne Street and Common Quay Street.

Retail Facilities

6.2.95 Wexford town centre has a well defined structure which is focused on a central spine in the form of the Main Street with a series of radial lanes and side streets linking down to the waterfront, such as Henrietta Street and upwards to High Street and the ecclesiastic quarter based around St Peter's Church. Main Street itself is divided into North Main Street and South Main Street and links a number of small public spaces such as Cornmarket and The Bullring.

6.2.96 The town centre supports a wide range of retail and service outlets in a linear development along Main Street. This area is primarily occupied by a good range of independent retailers. The profile of Wexford has improved considerably with the completion of the Wexford Opera House on High Street.

6.2.97 The Wexford Town & Environs Retail Strategy 2008 – 2015 notes that

"Main Street does have some spare capacity for infill development especially along its southern end and in the larger sites of under utilised lands between the Main Street and the Waterfront. In particular a number of backland areas remain underutilised. Overall vacancy rates in the town centre are low".

6.2.98 There is evidence of vacancy in the town centre, including Main Street, generally on its peripheries. The Retail Strategy also notes that the majority of the shop fronts in the town centre are well presented. No litter problem has been identified.

6.2.99 The Retail Strategy describes that

"Wexford town centre accommodates a diverse range of uses which enhances its role as the commercial *centre of the County. These include a wide variety of pubs, restaurants and cafes along Main Street and the Quays and a number of high quality hotels. There are also a large number and variety of independent boutiques, financial institutions and service providers. Other facilities in the town include the Cineplex Cinema and a conveniently located railway station on Redmond Square*".

6.2.100 It goes on to describe that the comparison sector includes Penney's, Shaw's, Dunnes Stores and Heaton's, while the representation of international multiples remains limited. The convenience sector of the town is primarily dominated by national/international multiples such as Dunnes Stores at Redmond Square (Image 6.23), Tesco and SuperValu and is complemented by small scale butchers, grocers and local supermarkets. Lowney's Shopping Mall in the town centre and Redmond Square are the two main shopping malls. Lowney's is now dominated by furniture retailers.

Image 6.23: Dunnes Stores at Redmond Square

6.2.101 Outside of the town centre there are a number of significant retail developments. These include a Tesco store on Distillery Road and a Retail Park to the east of the main town centre at Clonard, including occupiers such as Joyces Electrical, Toymaster and Home Focus. The convenience retail offer within the town has also been improved in recent years with the development of a number discount foodstores at various locations, such as the Aldi discount foodstore on Trinity Street.

6.2.102 Permission was granted for a 10 year period (expires on the 28th February 2017) under Reg. Ref: W2005/025 for development comprising of a mixed use scheme (retail, residential, hotel, office, leisure (including cinema), bars, restaurants, childcare facilities, community facilities, car parking, servicing and ancillary uses and spaces) with a gross floor space of 119,342 sq. m. approximately (plus a multi-storey car park of 55,047 sq. m. for 1,844 no. cars) on a site of 7.086 ha. approximately comprising lands at Trinity Wharf, Townparks (off Trinity Street) including an adjoining foreshore / harbour area of 2.4 ha approximately at Wexford Harbour. The development incorporates retail, non-retail services, office, leisure, community facilities, and car parking facilities in a two-storey shopping mall of 31,490 sq. m. gross retail floor area approximately. The residential element of the development will consist of 6 no. apartment blocks with an aggregate total of 266 no. residential units (31,853 gross sq. m.). Development has not commenced on this scheme.

Conclusion

6.2.103 In terms of its role as a competing centre for Waterford City, Wexford as the county town is considered vibrant, notwithstanding a number of vacant units in the town centre, with a good range of retail facilities available.

6.2.104 According to the Wexford Town & Environs Retail Strategy 2008 – 2015, one notable feature is the number of independent retailers, particularly in the comparison sector. This is complemented by a number of well known multiples and national chains.

6.2.105 There is also potential for additional retail development in Wexford, notably the Trinity Wharf development and the existing provision is supported by cultural attractions, including the historic nature of the town and the Opera House.

6.3.106 Despite being located a significant distance from Waterford City, Wexford has the potential to compete with Waterford City in terms of comparison retail terms, particularly noting the range of independent retailers present in the town. It will be important that Waterford City provides an appropriate and sufficient range of comparison retail facilities to ensure that trade is not lost to Wexford.

Kilkenny

Introduction

6.2.107 Kilkenny City is classified as a Level 1 Major Town Centre within the retail hierarchy set out in the Review of the Kilkenny City and County Retail Strategy 2007.

6.2.108 Kilkenny City has a population of 22,179 persons in 2006. The South East Regional Planning Guidelines 2010 – 2022 set a target population for Kilkenny City of 25,800 by 2016 and 28,200 by 2022.

Accessibility

6.2.109 Access to Kilkenny is provided via the N9/N10 from Waterford and Wexford, the N8 and N76 from the southwest (Cork), the N7 and N77 from the west (Limerick) and the N9 and N78 from the north and east (Dublin). Kilkenny City Centre is characterised by its historic street and laneway network and the River Nore and its two bridge crossings. The Inner Relief Road, Eastern Ring Road, Western Ring Road and North Link Road are the strategic routes that will have a significant impact on traffic flow in the City.

6.2.110 Iarnrod Éireann connects Kilkenny with regions throughout the country, including regular service to and from Dublin. The Irish Rail McDonagh Station is located at Dublin Road right next to the bus station. Kilkenny City is connected to the Dublin/Waterford rail line by a spur from Lavistown to the Railway Station on Dublin Road. The City is also served by a regular bus service which provides links to Cork, Dublin and Waterford.

6.2.111 Within the City Centre car parking is provided both on and off street. The City and Environs Development Plan 2008 - 2014 notes that car parking surveys carried out during the Kilkenny City Centre Local Area Plan indicated that there were approximately 1,400 free or daily rate car parking spaces within or in the periphery of the City Centre.

6.2.112 The main areas of traffic congestion centred on the James Street/High Street junction and the High Street/Patrick Street junction where the development of Ormonde Street and on street parking on Lower Patrick Street have resulted in considerable traffic congestion, particularly during the early morning and evening peak periods.

Retail Facilities

6.2.113 The City Centre has succeeded in maintaining its distinctive medieval character despite the development of major new centres and its continued popularity as both a tourist and cultural centre. Pedestrian crossings and wider pavements on High Street (Image 6.24), combined with outdoor seating and traditional style signposting, have enhanced the ambience and visual attraction of the City Centre although pedestrian / vehicle conflict remains an issue. The generous pedestrian area (Image 6.25) in front of Kilkenny Castle, connecting with the busy Rose Inn Street / High Street junction is also beneficial to pedestrian attractiveness.

6.2.114 The shop fronts in the City Centre represent a fine combination of traditional elegance and contemporary design and reflect the City's achievement of successfully merging old and new styles and influences. The covered area of the Town Hall on the High Street is the City's traditional meeting point and remains popular as a point of social interaction. Along with High Street (which extends into Parliament Street to the north), the city centre core comprises primarily of Rose Inn Street, the pedestrianised Kieran Street, and extends into John Street on the east side of the River, assisted by the attraction of the McDonagh Junction (Image 6.26) scheme at the eastern end of John Street.

6.2.115 Kilkenny's medieval heritage is most visible in the number of small streets and lanes which branch off from High Street and Parliament Street and provide for good pedestrian access in all directions, including towards John Street. John Street accommodates a number of Kilkenny's most popular hotels, bars and nightclubs and, as a consequence, it has become an attractive evening destination. In addition to the commercial uses which prevail, the vitality of the area is greatly enhanced by the pedestrian footfall generated by the County Council offices which are an important draw to the area.

6.2.116 The pedestrianisation of Kieran Street has further enhanced the retail development of this area, aided by the introduction of additional cafes and restaurants which have further enhanced the ambience of the street.

6.2.117 The City Centre is dominated by comparison floorspace that serves an extensive catchment area reflecting its County Town status. A combination of independent retailers and national and international brands, such as Heatons, Penneys, Argos, Jack & Jones and Wallis, are located both in core retail streets such as High Street and Kieran Street, and also in centres such as McDonagh Junction (image 6.26) and Market Cross Shopping Centre.

6.2.118 The offer and attraction of the City Centre has recently been enhanced, particularly in comparison retail terms, by the McDonagh Station scheme which is anchored by a Dunne's department store and contains a number of notable outlets, including A/Wear, Champion Sports, Peter Mark, Next, River Island and TK Maxx.

6.2.119 Convenience shopping is largely centred at the Dunnes Stores complex on Bateman Quay / Kieran Street and at Superquinn, located in the Market Cross Shopping Centre. Additional convenience floorspace is provided through a variety of retailers sprinkled throughout the City Centre. A large Dunne's Stores is also the anchor store at the McDonagh Junction development. A Lidl store is operating on Waterford Road, and almost immediately opposite, an Aldi store is at an advanced stage of construction.

6.2.120 In addition to its strong retail offering, Kilkenny City Centre offers a wide diversity of functions reflecting its role as the administrative centre and key centre of the County. The diversity is also founded in the centres historical importance and its role as one of the top visitor destinations in the country.

6.2.121 Kilkenny is renowned as a centre of artistic excellence and is home to the Kilkenny Design Centre and National Craft Centre, both of which are located opposite the Castle in the Castle Yard complex. The Kilkenny Arts Festival and the Cat Laugh's Comedy Festival have succeeded in carving out a unique popularity for the City in the contemporary cultural and artistic scene. Live theatre has long been a traditional part of Kilkenny's cultural life, with the Watergate Theatre and several public houses hosting an eclectic year long programme of events. The role of Kilkenny as a vibrant tourist and cultural location is witnessed by the ever increasing number and quality of licensed premises, hotels, bed and breakfasts and hostels in the City Centre.

Image 6.24: High Street, Kilkenny

Image 6.25: Pedestrian Area near Kilkenny Castle, Rose Inn Street and High Street

6.2.122 The 2007 Review of the Kilkenny City and County Retail Strategy outlines that there has been a small decrease from 2.9% to 2.1% in vacant floorspace since the 2001 Strategy was prepared. When retail warehousing floorspace is excluded from the floorspace total, vacancies in the City Centre alone are nearly 2.8%. It is noted in the strategy that *"this is not a level which should cause concern particularly given that it is generally spread around the City Centre".*

6.2.123 Some vacancy in the retail core was noted in April 2011, although vacancy rates in the core did not appear to be significant. Importantly, the Mc Donagh Junction scheme does not appear to have noticeably increased vacancies in the core retail area to any significant extent. It is noted that vacancies in some secondary or subsidiary retail streets within the core would appear to be high, for example, William Street, off High Street, would appear to have a very significant vacancy rate.

6.2.124 In terms of developments at edge of centre locations, a retail park development (Image 6.28 overleaf) is located in the Loughboy area accessed from the Southern Ring Road and includes typical bulky goods uses such as Woodies, Carpet Right, Home Focus, Halfords and DID Electrical. One unit was vacant in April 2011.

<u>*Conclusion*</u>

6.2.125 Kilkenny is considered vibrant, with a range of independent, national and international operators. The city has a good range of retail and service facilities. The 2007 Retail Strategy indicates that Kilkenny is trading well and a site visit of April 2011 supports this finding. There is little dereliction and vacancy in the City Centre, and recent developments in the City demonstrate investment confidence. It can be concluded that Kilkenny has a healthy, vibrant and vital City Centre.

6.2.126 It is noted that opportunities for the further large-scale development, particularly in the City Centre, may be limited given the existing layout of the City, the lack of vacancies and traffic congestion. Nonetheless, Kilkenny offers a wide and diverse range of retail facilities and is comparable in this regard to Waterford City.

6.2.127 Having regard to the attractiveness of the City Centre and the range of retail facilities present, Kilkenny provides significant competition to

Image 6.26: McDonagh Junction Scheme

Image 6.27: John Street

Waterford City. This is clearly evident from the household survey results in Chapter 4. Residents from the wider catchment area of Waterford City travel to Kilkenny particularly for clothing and footwear shopping In this regard, there is clearly a need for Waterford to improve and enhance its retail offer in order to compete more effectively with Kilkenny.

Image 6.28: Retail Park at Southern Ring Road, Kilkenny

Carlow

Introduction

6.2.128 Carlow is the county town of County Carlow in Ireland. It is situated approximately 84 kilometres from Dublin, 83 kilometres from Waterford via the N9 National Road, and 43 kilometres from Kilkenny, also via the N9. The River Barrow flows through the town, and forms the historic boundary between counties Laois and Carlow.

6.2.129 According to the Carlow Town Development Plan 2009 – 2015, Carlow Town's population is estimated as 14,200 in 2008, representing an increase of 7.5% since 2002. The official census figures for 2002 (13,218) and 2006 (13,898) highlight an increase of 1% per year approximately in the Town Council area.

6.2.130 The Retail Planning Guidelines identify Carlow as a Tier 3 Level 2 centre together with other towns such as Artklow, Athy, Dungarvan and New Ross. Carlow is also identified in the National Spatial Strategy as a County Town. As described in the Carlow Retail Strategy, the role of the County Town is to support and complement the roles of Kilkenny and Wexford as the Hubs and Waterford as a Gateway within the Region. The presence of Carlow Institute of Technology also enhances the profile of the town.

Accessibility

6.3.131 The N9 from Dublin to Waterford provides good national access to Carlow. The opening of the M9 in May 2008 has greatly reduced traffic through the town. In addition. The N80 also passes close to the edge of the town.

6.3.132 The town is also connected to the national rail network on the Dublin to Waterford railway line, with stations at both Carlow town and Bagenalstown, with approximately nine services daily.

Retail Facilities

6.3.133 The Carlow Retail Strategy describes that the traditional town centre is recognised as Tullow Street and Dublin Street (Image 6.29 overleaf). There are a number of independent and family owned shops located within the traditional town centre. There are also a number of independent high order comparison ladies clothes and shoe boutiques and a number of international and national retailers such as Benetton on Tullow Street, Dorothy Perkins in Houstons and Warehouse in Shaws. The pedestrianisation of this street has resulted in increased footfall and has helped to ensure a high rate of occupancy.

6.3.134 Retail developments over the past decade include the redevelopment of the livestock mart site, now called the Fairgreen Shopping Centre (Image 6.30 overleaf) on Barrack Street which was constructed in two phases. The first phase included the relocation of Tesco from the Hanover Shopping Centre within a new enlarged format. Other retailers introduced as part of this phase included Heatons, A Wear, Pamela Scott and Barratts. The second phase comprises River Island, Next, New Look and more recently Argos. The Carlow Shopping Centre on Kennedy Avenue accommodates outlets such as Superquinn, and Peter Mark. A number of the units in the centre are currently vacant, with vacancy levels reaching approximately 40% (April 2011).

6.2.135 Other retail facilities in the town include Aldi on Hanover Road to the south of the Burren River, Lidl on Burren Road and the Hanover Retail Park west of Hanover Road anchored by Woodies and which also includes other operators such as Carpet Right, Harry Corry and Right Price Tiles.

6.2.136 To the north east of the town within the environs, on the N9 with frontage onto the main Dublin Road, is the new Four Lakes Retail Park with Homebase as the anchor store, and also accommodating outlets such as Cost Plus Sofas, Currys and Senator Windows, Deerpark Retail Park opposite the IDA Business Park on the Dublin Road accommodates furniture and interior design bulky good retailers.

6.2.137 In terms of vacancy, the Carlow Retail Strategy (2009 – 2014) states the level of vacancy is 8% and describes that this level of vacancy is considered to be normal for a town of this size and stature. The overall feeling is that the town is attractive in terms of retail provision and that the more recent developments have not had a significant negative impact on the overall viability of the town. A site visit of April 2011 suggests that vacancy may now exceed this figure, with significant vacancy noted in the Carlow Shopping Centre, supplemented by some vacancies on the main retail streets of Dublin Street and, less so, Tullow Street. Vacancy was also noted on Barrack Street.

6.2.138 In terms of pedestrian accessibility, the town is car dominated with traffic having priority over pedestrians, with the exception of Tullow Street where paving, traffic calming and street furniture seeks to give pedestrian priority, although through traffic and parking is still permitted. The town is relatively free from litter and graffiti.

Conclusion

6.2.139 The quality and quantum of retail goods on offer in Carlow reflects its role and function in the national retail hierarchy as a Level 1 Tier 3 Centre.

6.2.140 Carlow competes with similarly designated centres including Kilkenny, Newbridge and Portlaoise but is the only main retail centre in the County and caters for its largely rural hinterland. However, Carlow does appear to have a relatively high vacancy rate.

6.2.141 The distance of Carlow from Waterford City, and the presence of other settlements such as Kilkenny, and indeed Dublin, offering a better range of comparison and convenience goods, means that Carlow is unlikely to compete directly with Waterford City.

Image 6.29: Dublin Street, Carlow


Image 6.30: Fairgreen Shopping Centre, Carlow

6.3 NATIONALLY COMPETING CENTRES

Cork

Introduction

6.3.1 Cork City Centre sits at the top of the retail hierarchy for the County, as set out in the Cork County Development Plan 2009 – 2015 and the Cork City Retail Strategy 2009 - 2015.

6.3.2 Cork City is one of the oldest cities in Ireland and the city's unique character derives from the combination of its plan, topography, built fabric and its location on the River Lee at a point where it forms a number of waterways. Medieval Cork was a walled city; the shadow of the wall remains today, influencing the streetscape and street pattern. The City Centre is predominantly contained in the central 'island' flanked on both its north and south sides by the Lee River Corridor, in addition to the area around McCurtain Street.

Accessibility

6.3.3 The City Centre is highly accessible by a range of public transport modes. Cork's Kent Station is the main train station in the city.

6.3.4 Public bus services within the city are provided by the national bus operator Bus Eireann. Cork is the focal point for the road network in the southern part of the country including the M8 and N25 routes.

Retail Facilities

6.3.5 Cork City Centre is the primary retail centre in the County and the focus for comparison retail development. According to the City Retail Strategy, it currently supports 84,770 square metres of net retail floorspace, of which 73,765 square metres (or 87%) is for comparison goods. The city centre is undergoing major redevelopment at present with large retail developments recently constructed at Cornmarket Street and the Opera Lane Development off St. Patrick's Street and others planned for Grand Parade. There is approximately 11,005 sq. m. of convenience floorspace.

6.3.6 Cork City Centre provides the main venue for higher order comparison goods and "fashion" goods within the Cork Metropolitan Area and as set out previously, is therefore at the top of the hierarchy within the region. The Retail Strategy proposes, in line with national guidance, that this dominant position of the City Centre be protected in terms of comparison goods, and particularly higher order comparison goods.

6.3.7 As described in the Retail Strategy, the city centre performs a regional role in retail terms and contains a higher order of retail than other centres in Cork and the existing retail profile of the City is considered to be substantial and varied. Debenhams and Brown Thomas operate as major department stores, whilst Dunnes, Penneys and Marks and Spencer also provide major stores. A wide range of international retailers and specialist stores help to increase the range of goods.

6.3.8 As set out in the Retail Strategy, Cork City Centre accommodates a diverse range of other complementary uses which enhances its role as the commercial centre of the County. These include a wide variety of pubs, restaurants and cafes along Patrick's Street and Oliver Plunkett Street, high quality hotels, independent boutiques, financial institutions and service providers. The English Market - a specialist food market is also a significant attraction.

6.3.9 The City Centre also accommodates a range of cultural and entertainment activities with a wide variety of theatres, cinemas and art galleries which enhance the overall vitality of the area. University College Cork is also located within close proximity to the City Centre.

6.3.10 Significant new development has been recently completed in the City Centre including large developments at the Guy's site, Cornmarket Street and at St. Patrick's Street / Emmet Place. The Cornmarket Scheme, anchored by TK Maxx has over 9,000 sq. metres of floorspace, although much of this scheme remains vacant. The Opera Lane development off Patrick Street is a significant new retail development for the City and includes flagship stores for the likes of The Gap, H & M, River Island, Next, New Look and Topshop. A new Dunnes Stores and a retail warehousing scheme have been completed at the An Post (Elysian) site, Eglinton Street.

6.3.11 Edge of centre facilities are also available in the likes of Mahon Point Shopping Centre, which includes tenants such as Tesco, Debenhams, River Island and Jack & Jones.

6.3.12 The Retail Strategy notes that there was high demand for new retail premises in Cork City and includes an objective for the City Centre to provide for the expansion to provide large floor plates to attract more premium occupiers.

6.3.13 A wide range of parking facilities are provided within the City Centre including Grand Parade Car Park, Carrolls Quay Car Park and City Hall Car Park. In addition improvements to the bus station and the introduction of the park and ride scheme have made the City more accessible.

6.3.14 In terms of amenity, Cork City has an attractive streetscape. The City Centre has retained much of its original form along its principal streets and is attractive to the pedestrian in both scale and use with a series of high quality public spaces. The City Centre now has a very high quality public realm on the principal shopping streets.

Conclusion

6.3.15 It is considered that Cork City Centre has an attractive and healthy cityscape and provides a significant range of retail services and facilities. The range of retail services offered is comparable only to Dublin, reflecting the role and status of Cork.

6.3.16 Cork City now accommodates a significant comparison offer with many major high street retailers that are not represented in Waterford. The completion of the N25 upgrade has made the City more accessible and residents of Waterford may be drawn to Cork not only for its high end comparison retailing, but also due to it high quality urban environment and range of other complementary service and leisure attractions. It is clear that Waterford will need to significantly enhance its retail offer and profile, particularly in terms of attracting the major high street chains not currently represented if its to compete more effectively with Cork.

Dublin

Introduction

6.3.17 Dublin City is the country's capital and largest city. With a population of 506,211 in 2006, the target set out in the Regional Planning Guidelines for the Greater Dublin Area 2010 – 2022 is for 563,512 persons in 2016 and 606,110 persons in 2022. The City is supported by the range of services and facilities that would be expected of a capital City.

6.3.18 The Retail Strategy for the Greater Dublin Area 2008 indicates that Dublin City Centre stands alone at Level 1 of the Retail Hierarchy and is 'unique in the range and mix of retail and associated linked services provided, the levels of connectivity it offers and the wide hinterland and tourist trade it serves'.

Accessibility

6.3.19 In accordance with its capital status, Dublin City is unprecedented in Ireland in terms of its accessibility, both by road and public transport. The nature of the national road system in Ireland means that Dublin is directly connected to all major cities and settlements by the national road network.

6.3.20 There are a significant number of public car parks located within the City. Traffic congestion remains problematic during morning and evening peak hours.

Retail Facilities

6.3.21 The two principal shopping streets in Dublin are Grafton Street (Images 6.32 and 6.33), on the south side of the River Liffey, and Henry Street (Image 6.31) on the north side of the river. They are linked by secondary, more specialised retail streets. Historically, Grafton Street has been regarded as the more up market/high fashion location and Henry Street as the more main stream fashion location. Generally footfall levels in each street have been historically similar.

6.3.22 As described in the Retail Planning Guidelines for the Greater Dublin Area (2008), Dublin City also has a number of specialist shopping areas located away from the core retail areas where certain types of trading have grouped - such as the antique traders in the Thomas Street / Francis St. area, furniture shops at Capel St. and designer clothing around Powerscourt Townhouse, as examples.

6.3.23 Other speciality shops dotted around the city area create a level of diversity within the retail offer and accommodate customers who travel specifically to purchase from a small pool of shops in the City.

6.3.24 The Retail Strategy contained at Appendix 4 of the Dublin City Development Plan 2011 – 2017 indicates that:

"the city centre retail core area is the main shopping, tourist and employment destination for the Greater Dublin Area (GDA). In retail terms, the retail core area dominates 'fashion' and higher order comparison goods retailing with the GDA and acts as a significant attraction for persons outside the region. Therefore, the area is at the top of the hierarchy of retail centres within both the GDA and Dublin City Council".

Image 6.31: Henry Street, Dublin

Images 6.31 and 6.32: Grafton Street, Dublin

6.3.25 There are also a number of settlements within the GDA classified as Level 2 'Major Town Centres / County Town Centres', including Swords, Blanchardstown, Tallaght, Liffey Valley, Dun Laoghaire, Dundrum, Bray, Wicklow, Navan, Naas / Newbridge, Leixlip (including Collinstown).

6.3.26 The Retail Strategy for the GDA indicates that permissions have been granted for significant volumes of retail which have yet to be built and which have the potential to increase the total floor area of retail in the GDA by 17%.

6.3.27 Perhaps the most significant of the extant permissions in Dublin is the scheme known as 'Dublin Central", located on O'Connell Street. Planning permission was granted by An Bord Pleanala on the 24th March 2010 under reference PL29N.232347 (Dublin City Council register reference 2479/08) for a mixed use development on the site. The development applied for consisted of 158,026 sq. m. gross floor space, including 109 no. retail units and an anchor store (56,155 sq. m.), 17 no. café / restaurant / bar units (5,372 sq. m.) and 108 no. residential units. The development will represent a significant addition to the core retail area in Dublin, linking key streets such as O'Connell Street, Henry Street and Parnell Street.

Conclusion

6.3.28 Dublin City Centre is unprecedented in terms of retail provision. Despite the economic downturn, the City Centre continues to be healthy and vibrant, offering a significant range of retail facilities. The attraction of the city as a retail destination is enhanced by the significant range of leisure, cultural and historic attractions in the city and excellent accessibility by both road and rail.

6.3.29 In terms of competition, it is apparent that residents of Waterford visit Dublin to avail of services and facilities that are not available in Waterford. The results of the Household Survey in Chapter 4 reveal that respondents travelled to Dublin on a regular basis and as often as once a week. This is to be expected of a capital city which is the principal retail centre in the country. In addition, there are likely to be linked trips associated with visits to Dublin to avail of the significant tourism, leisure, entertainment and cultural facilities and services on offer.

6.4 CONCLUSION

6.4.1 This section of the Strategy provides an assessment of competing centres to Waterford. While the traditional competitor centres such as Wexford, Kilkenny, Tramore, Dungarvan, Carlow, Carrick-on-Suir, New Ross and Clonmel are examined as part of this review, it was felt that it was also pertinent to focus on the impact of major retail centres such as Cork and Dublin, which are considered to be competing centres due to their position on the retail hierarchy and the level and quantum of retail provision.

6.4.2 In terms of competition with Waterford City, it is inevitable that some trade will be drawn to nationally significant comparison retail centres such as Cork and Dublin. This reflects the status of these centres and the range of national and international retail facilities on offer. Nonetheless, Waterford is a gateway in its own right and must develop to serve the retailing needs of its regional catchment. It must develop a range of comparison retailing and attraction commensurate with its status.

6.4.3 Waterford City must ensure that an appropriate range and quality of retail is provided to ensure that trade is not drawn to regionally competing centres, most notably Wexford, Carlow, Kilkenny and Clonmel. These centres offer a good range of retail facilities and generally have an attractive setting. Some have developed major retail developments such as the Showgrounds in Clonmel, whilst others such as Wexford have extant permissions for large scale retail developments, that if constructed will substantially improve the retail offer and attraction of the town.

6.4.4 Kilkenny is clearly a significant competitor to the City and it is identified in Chapter 4 that a significant proportion of people, particularly in the wider catchment of the City, travel to Kilkenny regularly for shopping, particularly comparison shopping. Whilst it is acknowledged that some of the 45 and 60 minute catchments falls within County Kilkenny and the city area, this extent of leakage may still be an indication that Waterford does not have significant “attraction” to draw consumers from its wider catchment and is effectively losing these potential customers and leaking expenditure to Kilkenny. In this regard, the City is not fulfilling its gateway function as the principle retail destination in the region.

6.4.5 It is noted however that many of these centres are located relatively significant distances from Waterford City and regular trade draw away from Waterford City to these centres is only likely to become a significant issue if Waterford City continues to fail to provide the range and quality of retail facilities, particularly comparison retail facilities, that would be expected of the regional capital and Gateway of the South-East. Notwithstanding this, the clear draw and attraction of Kilkenny for residents of the City is a concern and there is clearly a need for the City to develop and enhance its retail offer in this regard.

6.4.6 Potential competing centres in closer proximity to Waterford City, such as Tramore, New Ross, Dungarvan and Carrick-on-Suir provide primarily a retail service aimed at the local and surrounding community, ensuring that sufficient convenience retail provision is in place to meet demands, and providing a limited range of comparison retail. It is to be expected that occupants of these centres and surrounding areas will travel to centres such as Waterford City for their comparison retail needs.

6.4.7 In conclusion, it is considered that in terms of competition from surrounding centres, there is a risk of increasing trade draw from Waterford City to other centres both in the region (particularly Kilkenny) and at a national level to Cork and Dublin if Waterford City does not succeed in providing the quality and range of retail facilities that would be expected of the regional gateway capital. Competing centres such as Cork have successfully attracted major high street flag ship stores with large retail floor plates that are successfully integrated with the main shopping street—Patrick Street. Waterford City needs to develop similar types of development if it is to retain expenditure and become self sufficient in retailing terms. It is evident that there is leakage of expenditure to Kilkenny. This is likely due to its relative proximity to the City, its attractive setting and urban environment and its good range of retail facilities and services. It is evident that Waterford needs to enhance its retail offer in order to compete more effectively with Kilkenny.

CHAPTER 7

Quantitative Assessment

7.1 INTRODUCTION

7.1.1 This section provides an assessment of the likely capacity in quantitative terms for additional retail floorspace in Waterford City. In the strategy, we cover the period from 2010-2016 and 2016 to 2022. In respect of looking beyond 2016, 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 2010.

7.1.2 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.

7.1.3 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 continues to be reinforced and strengthened.

7.1.4 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 2010.

The Approach

7.1.5 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 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.

7.2 DEFINITION OF STUDY AREA

7.2.1 The study areas identified for the purposes of this assessment are consistent with those identified in Chapter 4 of the Retail Strategy namely:

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

7.2.2 The study area for the purposes of this assessment is identified in Figure 7.1 overleaf prepared by Demographics Ireland.

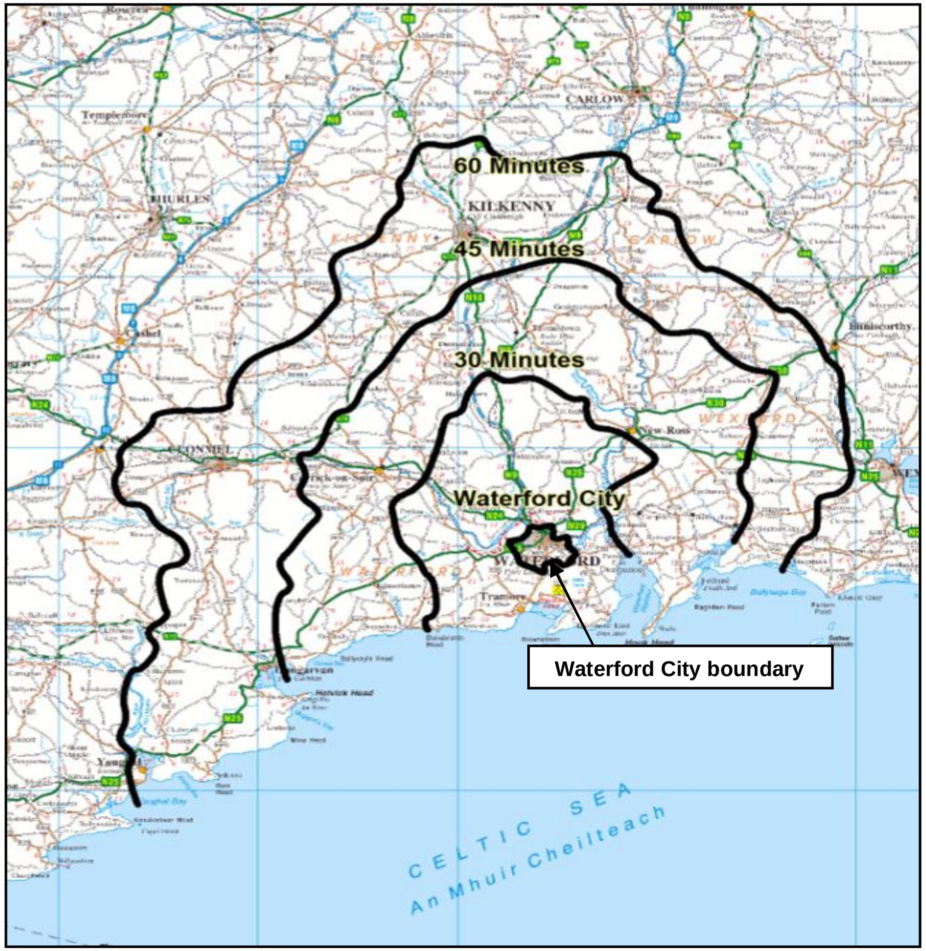


Figure 7.1: Study Area

7.3 POPULATION OF STUDY AREA

7.3.1 The 2006 Census of population identifies a population of 45,748 for Waterford City. Preliminary census 2011 figures outline that the population of the City has grown to 46,747 in 2011, an increase of 999 persons in the 5 year intercensal period. A drivetime was commissioned from Demographics Ireland as part of the Household Survey undertaken to inform the retail strategy.

7.3.2 Table 7.1 below shows the population of the administrative boundary of Waterford City, a 0-30 drivetime isochrone from the City excluding the City Centre, a 0-45 drivetime isochrone and a 45-60 minute isochrone of the City Centre in 2006, 2010, 2016 and 2022. The population figures for 2006 are based on the 2006 census results. The figures for the base year of 2010 are calculated based on a review of the results of the 2011 Preliminary Census.

7.3.3 The Settlement Strategy included within the Regional Planning Guidelines sets out the target population for the region and for each of the main settlements in the region. It is envisaged that by 2022, the population of the City will be 55,000 and these population targets have been incorporated for the purposes of this assessment.

7.3.4 The population growth rates assumed for the areas outside of the administrative boundary of the City are based on those set out within the Regional Planning Guidelines for the South East Region. An average of growth rates for Co. Waterford, Co. Kilkenny and Co. Wexford estimate population growth of approximately 2.75% per annum between 2006 and 2010, a growth rate of 1% per annum between 2010 and 2016 and 1.5% per annum between 2016 and 2022.

Table 7.1: Population Projections

Year	Waterford City	0-30 minute Isochrone (Excl Waterford City)	30-45 minute isochrone	45-60 minute isochrone	Total
2006	45,748	40,408	57,921	115,520	259,597
2010	46,548	43,712	61,389	122,908	274,557
2016	51,000	46,401	65,166	130,469	293,036
2022	55,000	50,737	71,255	142,661	319,653

Source: CSO, Demographics Ireland & Regional Planning Guidelines for the South East Region 2010-2022

7.4 EXPENDITURE PER CAPITA

7.4.1 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.

7.4.2 The most recent Annual Service Inquiry with data in an appropriate format for this purpose is the 2006 Annual Services Inquiry which was published in 2008. This source is therefore used for the purposes of this capacity assessment.

7.4.3 Some adjustments to the data set out in Table 5.1 of the Services Inquiry are also necessary in order to ensure that goods are correctly categorised between comparison and convenience. Firstly, it is estimated that approximately 10% of retail sales in non specialised stores is in department stores and other comparison goods. The remaining 90% is categorised as convenience sales. This is in line with the conclusions of the Tym/Blackwell study commissioned as part of the previous Retail Planning Guidelines for Planning Authorities (2005).

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

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

7.5 EXPENDITURE ESTIMATES

7.5.1 Based on the 2006 Annual Service Inquiry we have estimated that the total expenditure per capita in 2006 on convenience goods was €3,759 and €3,402 on comparison goods.

7.5.2 These expenditure figures are adjusted to a 2010 price year in line with the Consumer Price Index as set out in Table 7.2 below.

Table 7.2: Adjustments to Available Expenditure

	Convenience	Comparison
Expenditure per capita 2006 prices	€3,759	€3,402
2006 CPI	100	100
	37.59	34.02
2010 CPI	101.2	101.2
2010 Totals	€3,804	€3,443

Source: CSO Consumer Price Index

7.5.3 The figures set out within Table 7.2 illustrate convenience and comparison expenditure per capita prices in 2006 adjusted to a 2010 price year. No growth in expenditure per capita has been assumed between 2006 and 2010 having regard to the recent economic downturn. This approach is in accordance with the results of the Retail Sales Index which illustrates growth in expenditure between 2006 and 2008 and a decline in available expenditure from 2008 to 2010.

7.5.4 It was also considered necessary to make a further adjustment to the comparison expenditure figure having regard to the trends observed from the Retail Sales Index. An adjustment is made to provide for a small reduction in comparison goods expenditure per capita from 2006 to 2010. While the Retail Sales Index shows that "high street" comparison goods, such as clothing and footwear remain at or above 2006 levels there has been a slight reduction on the overall comparison figure between 2006 and 2010. The population increase as set out in the 2011 preliminary census also means that there has been a greater reduction in per capita comparison expenditure. Having reviewed the figures for comparison goods expenditure as set out in 2006 and 2010 Retail Sales Index it is considered that a reduction of 6.5% in expenditure per capita from 2006-2010 can be justified. The revised figures are illustrated in Table 7.2b below

Table 7.2b: Available Per Capita Expenditure		
	Convenience	Comparison
2010	€3,804	€3,219

Assumption: 6.5% reduction in comparison expenditure

7.5.5 For convenience goods we have assumed no growth per annum between 2010 and 2016 and 1% growth rate between 2016 and 2022. This is based on the assessment of growth rates set out in the Retail Sales Index (CSO) and adjusted to allow for population increases.

7.5.6 Expenditure growth on comparison goods has been substantially 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. Exceptionally high levels of growth in comparison goods sales were experienced in the late 1990's up to 2007.

7.5.7 However as a result of the recent economic downturn, expenditure per capita has declined in the period 2008 to 2010 and is likely to grow slowly in the next few years in accordance with economic forecasts. We have therefore used a more conservative long term average for projecting forward and we have assumed a growth rate of 2% per annum between 2010 and 2016 and 3% per annum between 2016 and 2022. This is illustrated in Table 7.3.

Table 7.3: Expenditure per capita		
	Convenience	Comparison
2010	€3,804	€3,219
2016	€3,804	€3,625
2022	€4,038	€4,329

Assumption: Convenience Goods Expenditure 0% growth rate per annum from 2010-2016 and 1% per annum from 2016 to 2022, Comparison Goods Expenditure 2% per annum from 2010 to 2016 and 3% from 2016 to 2022.

7.6 TOTAL AVAILABLE EXPENDITURE

7.6.1 The total available expenditure is set out in Tables 7.4 and 7.5 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 this strategy. The survey results illustrated an inflow of 8% of convenience expenditure from the 30-45 minute drivetime isochrone for convenience goods. The survey data shows that Waterford City has a very low market share beyond the 30 minute isochrone. In 2010 we estimate the total available for convenience expenditure is €177m within the City Centre and €166m within the 0-30 minute drive time isochrone of the City (excluding the City Centre). The total available expenditure for convenience goods is identified within Table 7.4 at €343 million in 2010, €370 in 2016 and €426 in 2022.

Table 7.4: Total Available Convenience Expenditure			
	Waterford City Administrative Area	0-30 minute Isochrone excl Waterford City	Total
2010	€177,068,592	€166,280,448	€343,349,040
2016	€194,004,000	€176,510,046	€370,514,046
2022	€222,091,246	€204,877,339	€426,968,585

Source: Tables 7.1 and 7.3

7.6.2 Table 7.5 below sets out the total available comparison expenditure within Waterford City, a 0-30 minute isochrone excluding the City 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 isochrone and 52% from the 30-45 minute isochrone. The total available comparison expenditure is estimated at €488m in 2010, €589 in 2016 and €766 in 2022.

Table 7.5: Total Available Comparison Expenditure (including Bulky Household Goods)

	Waterford City Administrative Area	0-30 minute Isochrone excl Waterford City	30-45 minute Isochrone	Total
2010	€149,847,554	€140,717,889	€197,623,776	€488,189,219
2016	€184,892,732	€168,220,370	€236,248,177	€589,361,279
2022	€238,087,010	€219,633,300	€308,452,339	€766,172,649

Source: Tables 7.1 and 7.3

7.6.3 Table 7.5 sets out the total available comparison expenditure available within the administrative boundary of Waterford City 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 Centre. It is necessary to establish the expenditure potentially available to City Centre 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.

7.6.4 Estimates for expenditure on bulky warehouse goods and pure comparison floorspace are set out in Tables 7.6 and 7.7 below.

Table 7.6: Total Available Expenditure on Comparison Floorspace (excluding bulky household goods)

	Waterford City Administrative Area	0-30 minute Isochrone excl Waterford City	30-45 Minute Isochrone	Total
2010	€119,878,043	€112,574,311	€158,099,021	€390,551,375
2016	€147,914,186	€134,576,296	€188,998,542	€471,489,024
2022	€190,469,608	€175,706,640	€246,761,871	€612,938,119

Source: Table 7.5 above, Assumption 80% of total set out in Table 7.5

Table 7.7 Total Available Bulky Household Goods Expenditure

	Waterford City Administrative Area	0-30 minute Isochrone excl Waterford City	30-45 Minute Isochrone	Total
2010	€29,969,511	€28,143,578	€39,524,755	€97,637,844
2016	€36,978,546	€33,644,074	€47,249,635	€117,872,256
2022	€47,617,402	€43,926,660	€61,690,468	€153,234,530

Source: Table 7.5 above, Assumption 20% of total set out in Table 7.5

7.7 ADJUSTMENTS TO AVAILABLE EXPENDITURE

7.7.1 Some adjustments are also required to the capacity figures outlined in Tables 7.4, 7.6 and 7.7 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:

7.7.2 The survey establishes that approximately 95% of convenience goods expenditure in Waterford City is retained by the City, 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 comparison 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.

Table 7.8: Total Available Convenience Expenditure

	Waterford City Administrative Area	0-30 minute Isochrone excl Waterford City	Inflows from 30-45 minute isochrone	Total Available Expenditure
2010	€168,215,162	€96,442,660	€18,681,900	€283,339,723
2016	€184,303,800	€102,375,827	€19,831,214	€306,510,841
2022	€210,986,684	€118,828,857	€23,018,329	€352,833,869

Sources: Tables 7.4, 7.6 and 7.7

Comparison

7.7.3 The household survey establishes that approximately 92% of comparison goods expenditure in Waterford City is retained by the City Centre area 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 Centre will remain at current levels over the lifetime of the retail strategy.

7.7.4 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 area will increase within the timeframe of the Retail Strategy in line with improvements to the retail offer and trade draw of the City Centre. For the purposes of this assessment it is assumed that by 2016 the City Centre area will retain 94% of comparison goods expenditure within the City and this is envisaged to grow to 96% by 2022. Trade draw from the 0-30 minute drivetime isochrone is envisaged to grow to 94% by 2016 and 96% by 2022. Inflows from the 30-45 drivetime isochrone are estimated to grow to 55% by 2016 and 60% by 2022. 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 7.9 below.

Table 7.9: Total Available Comparison Expenditure

	Waterford City Administrative Area	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 2022					
2010	€110,287,800	€101,316,880	€82,211,491	€25,322,627	€319,138,798
2016	€136,081,051	€121,118,667	€98,279,242	€30,271,785	€385,750,744
2022	€175,232,040	€158,135,976	€128,316,173	€39,523,704	€501,207,892
SCENARIO 2: Increase in Inflows & Trade Retention in 2016 and 2022					
2010	€110,287,800	€101,316,880	€82,211,491	€25,322,627	€319,138,798
2016	€139,039,335	€126,501,718	€103,949,198	€30,271,785	€399,762,036
2022	€182,850,824	€168,678,374	€148,057,123	€39,523,704	€539,110,024

Bulky Household

7.7.5 The household survey establishes that approximately 69.5% of bulky goods expenditure in Waterford City is retained by the City 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 2016 and 72% by 2022. It is also assumed that inflows of expenditure from the 0-30 minute isochrone will increase to 52% by 2016 and 55% by 2022. Inflows of expenditure form 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 7.10 below.

Table 7.10: Total Available Bulky Goods Expenditure					
	Waterford City & Environs	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 2022					
2010	€20,828,810	€14,071,789	€3,557,228	€6,330,657	€44,788,484
2016	€25,700,090	€16,822,037	€4,252,467	€7,567,946	€54,342,540
2022	€33,094,094	€21,963,330	€5,552,142	€9,880,926	€70,490,492
SCENARIO 2: Increase in Inflows & Trade Retention in 2016 and 2022					
2010	€20,828,810	€14,071,789	€3,557,228	€6,330,657	€44,788,484
2016	€25,884,983	€17,494,919	€4,252,467	€7,567,946	€55,200,314
2022	€34,284,530	€24,159,663	€5,552,142	€9,880,926	€73,877,260

7.8 EXISTING RETAIL FLOORSPACE IN CATCHMENT AREA

7.8.1 The existing retail floorspace within the catchment area is estimated having regard to the figures set out within the 2009 Waterford City Centre Study and information provided by Waterford City Council.

Table 7.11: Existing Retail Floorspace within Waterford City Centre				
	Convenience sq.m.	Comparison sq.m.	Bulky sq.m.	Total sq.m.
Existing Floorspace breakdown Waterford City	31,675	39,252	41,444	112,371

Source: 2009 Waterford City Centre Study & Waterford City Council

7.9 TURNOVER OF EXISTING FLOORSPACE

7.9.1 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 €9,000 per sq. m. is assumed for existing convenience floorspace within the catchment area in 2010 and €6,000 per sq. m. for comparison floorspace. An average turnover of €2,000 per sq. m. is assumed for bulky goods in 2010 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). They reflect the average turnover levels retailers will require to sustain a healthy level of activity.

Table 7.12 Turnover per sq.m. of Existing Retail Floorspace	
	2010
Convenience	€9,000
Comparison	€6,000
Bulky	€2,000

7.9.2 These figures show the average turnover per sq metre of existing floor space overall in Waterford City. 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.

7.9.3 The turnover of existing retail floorspace within the City in 2010, 2016 and 2022 is obtained by multiplying the existing floorspace estimates set out in Table 7.11 by the turnover per sq. m estimates set out in Table 7.12. This is illustrated in Table 7.13 below.

Table 7.13: Turnover of Existing Retail Floorspace

	2010
Convenience	€285,075,000
Comparison	€235,512,000
Bulky	€82,888,000

Source: Tables 7.11 and 7.12

7.9.4 The residual surplus for additional retail floorspace within the City is obtained by subtracting the turnover of existing convenience, comparison and bulky goods expenditure as set out in Table 7.13 by the total available expenditure set out in tables 7.7, 7.9 and 7.10. Tables 7.14 a and b below set out the available expenditure under Scenario 1 and 2.

Table 7.14a: Scenario 1 Available Expenditure for Additional Retail Floorspace in Waterford City

Year	Available Expenditure	Turnover of Existing Floorspace	Residual Surplus
Convenience			
2010	€283,339,723	€285,075,000	-€1,735,277
2016	€306,510,841	€285,075,000	€21,435,841
2022	€352,833,869	€285,075,000	€67,758,869
Comparison			
2010	€319,138,798	€235,512,000	€83,626,798
2016	€385,750,744	€235,512,000	€150,238,744
2022	€501,207,892	€235,512,000	€265,695,892
Bulky			
2010	€44,788,484	€82,888,000	-€38,099,516
2016	€54,342,540	€82,888,000	-€28,545,460
2022	€70,490,492	€82,888,000	-€12,397,508

Source: Tables 7.13, 7.7, 7.9 & 7.10

Table 7.14b: Available Expenditure for Additional Retail Floorspace in Waterford City Scenario 2

Year	Available Expenditure	Turnover of Existing Floorspace	Residual Surplus
Convenience			
2010	€283,339,723	€285,075,000	-€1,735,277
2016	€306,510,841	€285,075,000	€21,435,841
2022	€352,833,869	€285,075,000	€67,758,869
Comparison			
2010	€319,138,798	€235,512,000	€83,626,798
2016	€399,762,036	€235,512,000	€164,250,036
2022	€539,110,024	€235,512,000	€303,598,024
Bulky			
2010	€44,788,484	€82,888,000	-€38,099,516
2016	€55,200,314	€82,888,000	-€27,687,686
2022	€73,877,260	€82,888,000	-€9,010,740

Source: Tables 7.13, 7.7,7.9 & 7.10

7.10 FLOORSPACE CAPACITY

7.10.1 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 7.14. For the purposes of this assessment a turnover per sq. m. of €12,000 is assumed for future convenience floorspace, €7,000 for comparison retail floorspace and €2,500 for bulky goods floorspace in 2010 prices. The figures for comparison and bulky goods expenditure have been adjusted to grow at a rate of 1% per annum from 2010 to 2022 to allow for efficiency gains by retailers as illustrated in Table 7.15 below. No growth is applied to the turnover of convenience floorspace as this is considered to be trading at a high level.

Table 7.15 Turnover of Future Retail Floorspace 2010, 2016 and 2022			
	2010	2016	2022
Convenience	€12,000	€12,000	€12,000
Comparison	€7,000	€7,431	€7,888
Bulky	€2,500	€2,654	€2,817

Assumption: 1% growth per annum for comparison and bulky goods turnover, no increase in turnover for convenience goods.

7.10.2 The future floorspace requirements for additional convenience, comparison and bulky goods floorspace within the catchment is illustrated in Table 7.16.

Table 7.16 Additional Floorspace Requirements for Waterford City			
	2010	2016	2022
SCENARIO 1: Base Year Inflows to be Retained to 2022			
Convenience sq.m.	-145	1,786	5,647
Comparison sq.m.	11,947	20,219	33,685
Bulky Goods sq.m.	-15,240	-10,756	-4,401
SCENARIO 2: Increase in Inflows & Trade Retention in 2016 and 2022			
Convenience sq.m.	-145	1,786	5,647
Comparison sq.m.	11,947	22,104	38,490
Bulky Goods sq.m.	-15,240	-10,433	-3,199

Source: Tables 7.15, 7.14a & 7.14b

7.10.3 It can be seen from Table 7.16 that the capacity for additional convenience floor space within the City area is 5,647 sq.m. by 2022. Although the potential for additional net convenience floorspace would appear limited at 2016 (1,786 sq. metres), this should be viewed within the context of the extent of convenience floorspace which has been recently implemented. 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 close proximity to existing neighbourhood/district centres. Additional modest scale convenience floorspace (i.e. less than 1,500 sq. m. net) within or close to existing designated centres would be appropriate in order to improve the range of retail offer and improve competition in the market. The requirement for additional comparison floorspace within the City is significant over the period to 2016 and beyond to 2022. Table 7.16 indicates a requirement for an additional 33,685 sq. m. of comparison floorspace under Scenario 1 by 2022 and this increases to 38,490 sq. m. under Scenario 2.

7.10.4 Table 7.16 above illustrates no requirement for additional retail warehouse floorspace within the catchment up to 2022. This is not surprising having regard to the extent of this format of retail floorspace recently developed within the Waterford City area.

7.10.5 It should be noted that the floorspace capacity figures outlined in Table 7.16 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. 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 issue of likely impact on the city centre as a whole arise.

CHAPTER 8

Policies, Action and Vision for the Future

8.1 INTRODUCTION

8.1.1 The purpose of this chapter is to set out key policies and actions in terms of the future of development of retail facilities in Waterford City and to establish a clear vision for the future development of the City in retailing terms.

8.1.2 The chapter examines the following issues:

- Retail Hierarchy
- Definition of Core Retail Area
- Distribution of Floorspace Requirements
- Specific Objectives for City Centre Improvements
- Specific Objectives for District Centres, Neighbourhood Centres, Retail Warehousing Development and Local Shops.
- Overall Conclusions
- Vision for the Future

8.2 RETAIL HIERARCHY

8.2.1 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.

8.2.2 The national retail hierarchy is set out in the Retail Planning Guidelines (2012). It reflects both the settlement structure of the State and low residential densities in rural areas.

8.2.3 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, along with Cork, Limerick/Shannon and Galway provide a range of high-order comparison shopping which is largely unmatched in smaller cities and towns. In this regard, the primacy of the City should be protected and promoted to ensure it retains its position in the national hierarchy. This needs to be acknowledged and recognised in the development plan policies covering the City and in the retail strategy.

The Role of the Development Plan in Defining the Retail Hierarchy

8.2.4 The formulation of the retail strategy for City should ensure that policies and proposals are consistent with the Retail Planning Guidelines (2012) but it should also be forward looking in assessing Waterford City within the national hierarchy both now and in the future.

8.2.5 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 outline the level and form of retailing activity appropriate to the various components of the settlement hierarchy in the core strategy.

The Existing Retail Hierarchy of Waterford City

8.2.6 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 gateway of the region, 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 its environs 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.

8.2.7 The Retail Hierarchy within Waterford City is respectively:

BOX 8.1: 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)
- Caufields Hypermarket Morgan Street

Third Tier – **Neighbourhood Centres**.

The identified Neighbourhood Centres are:

- Cleaboy
- Kilcohan (including Salvage Shop Site)
- Ballinakill
- Ross Abbey SC, Rathculliheen, Ferrybank
- Ballybeg
- Proposed Neighbourhood Centre at Knockboy
- Proposed neighbourhood centre at Carrickpherish

Fourth Tier - Local Shops.

8.2.8 The Retail Planning Guidelines (2012) define a 'City and Town Centre' as follows:

"Provide a broad range of facilities and services and fulfill a function as a focus for both the community and public transport. The term excludes district centres, retail parks, and local centres". (Page 54).

8.2.9 At present 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.

8.2.10 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 Gateway status, 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 Gateway City, it should be the prime focus for future retail investment and development especially for non bulky comparison goods including fashion and footwear.

Second Tier

8.2.11 The second tier centres include the existing district centres in the environs of the City. District Centres usually provide a more limited service role. They are defined in the Retail Planning Guidelines as follows:

"Provides a range of retail and non-retail service functions (e.g. banks, post office, local offices, restaurants, public houses, community and cultural facilities) for the community at a level consistent with the function of that centre in the core strategy. They can be purpose built as in new or expanding suburbs or traditional district centres in large cities or town". (Page 54).

8.2.12 The existing district centres in the environs of the City (with the exception of Abbeylands 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. The Hypercentre at Morgan Street has also been identified as a District Centre considering its potential for redevelopment and its role in serving the residential community in the vicinity.

8.2.13 It is noted in the Retail Planning Guidelines (2012) that there is no clear size threshold for a district centre.

8.2.14 Most of the District Centres in the City area are modest in scale with limited development potential. The existing floorspace of each centre is presented in Table 8.1 below:

Table 8.1: Floorspace: Existing District Centres in Waterford

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

8.2.15 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 (2009) has designated Ferrybank Abbeylands SC as a 'Gateway Suburban Centre' a level above District Centre as per the hierarchy set out in the Retail Planning Guidelines. Gateway Suburban Centre is not defined in the Retail Planning Guidelines and this designation is not in accordance with the hierarchical definitions as set out in the RPG's. In this regard, Ferrybank should be considered as a District Centre. It is detailed in the plan that the centre is permitted to expand its level 2 type comparison retail component by a further 3,000 sq. metres. Such further development and expansion of this centre could be a significant threat to the future vitality and viability of the City Centre.

8.2.16 There is an extant permission for the redevelopment of the Waterford Shopping Centre at Lisduggan. The extant permission permits 11,029 sq. metres of development with 3,417 sq. metres of convenience floorspace and 3,584 sq. metres of comparison floorspace. The redevelopment of Lisduggan would be welcomed considering the current dilapidated state of the centre.

8.2.17 It is noted, that An Bord Pleanala has been restrictive in terms of the quantum and extent of development permitted in district centres in the suburbs of the City. Under file ref. 208088, the Board refused permission for the expansion of the district centre at Farranshoneen for comparison development. A previous application at Ferrybank (file ref. 207509) was also refused due to its excessive scale and level of comparison floorspace. 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 is experiencing pressure to develop its district centres to accommodate a more significant range of convenience and comparison floorspace.

8.2.18 In this regard, it is recommended that the future development or redevelopment of the district 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 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

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

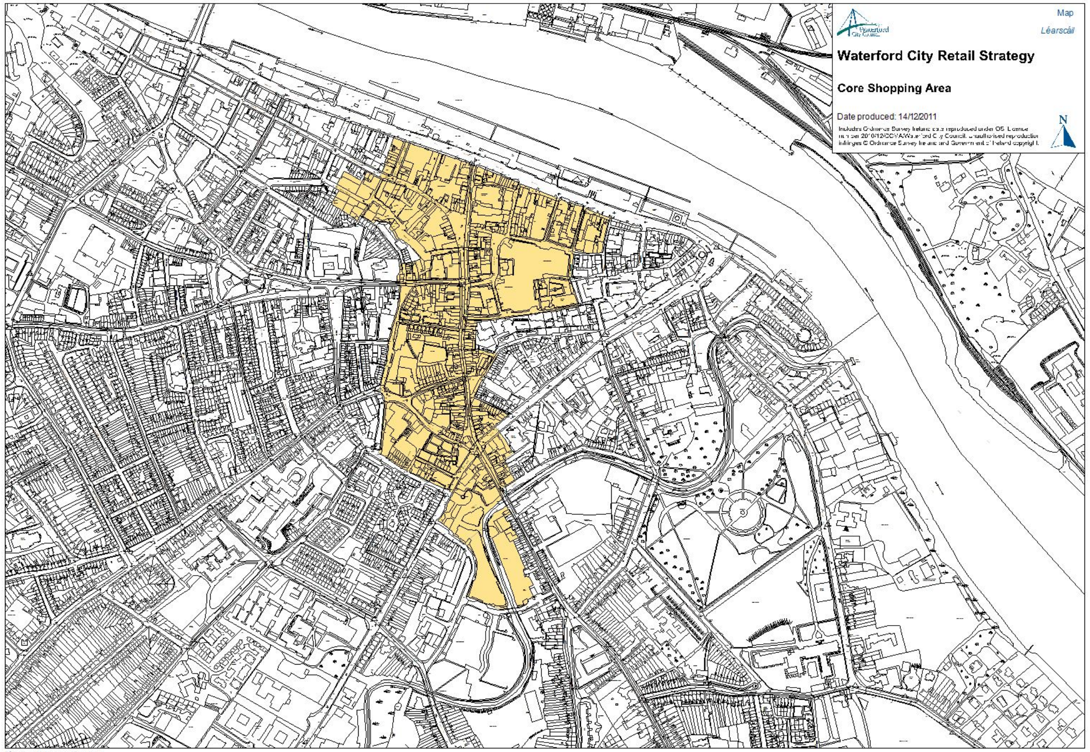
"*Comprise a small group of shops, typically comprising newsagent, small supermarket/general grocery store, sub-post office and other small shops of a local nature serving a small, localised catchment population".* (Page

54).

8.2.20 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.

8.2.21 At present the suburbs are well served by neighbourhood facilities. In areas such as Knockboy and Carrickphierish, neighbourhood centres are either planned or permitted but not yet constructed. It is not 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 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.

8.2.22 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.



Map 8.1: Core Shopping Area of Waterford City
Source: John Spain Associates and Waterford City Council

Fourth Tier

8.2.23 Retail facilities in the fourth tier are typically small local shops serving residential estates, shops attached to petrol filling stations etc which serve a local catchment area. The important social and economic functions of these facilities in serving local neighbourhoods, catering for the less-mobile, the elderly and those without a car is recognised in the Retail Planning Guidelines and should be supported and allowed to grow through this Strategy.

8.3 Definition of the Core Retail Area

8.3.1 The core shopping area of Waterford City is identified on Map 8.1. 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.

8.3.2 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.

8.3.3 The Core area in Waterford extends from the South City Quays and includes Barronstrand Street, Broad Street, John Roberts Square, Georges Street, Little Patrick Street, Patrick Street, Arundel Square, Alexander Street, Lady Lane, New Street, John Lane and Michael Street, and extends to include the Millar's Marsh site and Railway Square.

8.3.4 There are opportunities for some additional retailing on the adjoining Gasworks site which is identified as an edge of centre site within the Retail Strategy. This is discussed in more detail in section 8.4 below.

8.4 DISTRIBUTION OF FLOORSPACE REQUIREMENTS

8.4.1 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.

8.4.2 We have estimated that by 2016 there is a need for 1,786 sq. metres of additional convenience floorspace and 20,219 sq. metres of comparison floorspace under a low growth scenario and 22,104 sq. metres under a high growth scenario. By 2022 it is anticipated that there is a total capacity for 5,647 sq. m. of convenience floorspace and between 33,685 and 38,490 sq. metres of comparison floorspace. There is no requirement for additional retail warehouse floorspace within the catchment up to 2022.

8.4.3 It is recommended that new retail floorspace provision will reflect the existing and projected population in the City and the identified retail hierarchy. Additional demand for comparison retail floorspace should be promoted within the existing City Centre area. Convenience development would be appropriate as an anchor store within a major City Centre retail scheme. Comparison floorspace is essential in ensuring that the City enhances its retail offer and attraction.

8.4.4 The figures set out 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. 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 centre and the issue of likely impact on the city centre as a whole arises.

8.4.5 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 centres or on appropriately zoned commercial land near to such centres. 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 existing neighbourhood/ district centres due to their large floor plate requirements. In this regard, appropriately zoned edge of centre locations may be considered for such development. However, future comparison floorspace should be targeted to the City Centre core retail area.

8.4.6 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 Centre. Such stores can sell clothing, footwear and household items which can impact negatively on the established City Centre.

8.4.7 A number of potential opportunity sites for the development of high end comparison retailing have been identified in the City Centre Report prepared by the Council in 2009 and every effort should be made to prioritise these sites for significant retail development. The location of these sites is discussed in more detail in Section 8.5 below. 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. A number of key edge of centre sites are also identified in this report. These are discussed further in section 8.5 of this report. Comparison retailing may be appropriate at these edge of city centre locations the development will synergise and complement with existing and proposed retail development in the City Centre.

8.4.8 In terms of retail warehouse development, the City is well served in terms of bulky household provision. This is reflected in the low projected floorspace requirements for this category of retail floorspace. There is an existing retail park at Buttlerstown (in the County Council administrative area) which is not fully occupied, and a further fully developed park at Six Cross Road which is vacant. Permission has also been granted for further such development at Cork Road and at the Airport Road. It is recommended that retail warehouse provision is met in these existing and planned retail parks or else in the vicinity of the Tramore Road/Inner Relief Road which is also characterised by this type of development. Conditions should be imposed in such developments clearly restricting the sale of goods to bulky household items.

8.4.9 In addition to the specific City Centre identified sites in the City Centre Report 2009, discussed further in section 8.5 below, this report identifies other potential opportunity sites for retail development.

Conclusions

8.4.10 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.

8.4.11 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 neighbourhood and district shopping centres as well as in other sites such as Poleberry and Morgan Street. 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.

8.5 SPECIFIC OBJECTIVES FOR WATERFORD CITY CENTRE

8.5.1 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

8.5.2 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.

- In addition, third level facilities and student accommodation associated with Waterford IT should be promoted in the City in order to attract third level students and the spending power associated with this sector.

- 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.

- 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.

Design and Shop Front Guidelines

- 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.

Business Improvements District Schemes

- 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.

- BID schemes originated in Canada in 1971 and are now in operation in many cities and towns throughout the world including Dublin City. It is estimated that there are now more than 400 BID type schemes in operation in Canada and USA. European countries are also becoming involved in these schemes, including Austria, Belgium, Denmark, France, Holland and Portugal. Legislation has now been enacted to enable Business Improvement District Schemes (BIDS) to operate in Ireland.

Figure 8.1: Dublin Street Ambassadors Funded Through BIDS

- 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.

- The local authority has the ultimate say in whether a BID scheme goes ahead – in particular, it must ensure that the interests of the local community are protected. Before a council takes a decision on a BID proposal, a plebiscite must be held among the business community in the BID area. Commencement of the BIDS provisions coincides with the making of Regulations which will govern the holding of a plebiscite. Once approved by the council, following a successful plebiscite, a specially established BID company will have responsibility for implementing the provisions of a BID scheme, with the local authority playing a key role in any such company.

- The ethos of BIDS is that it would provide services in an area that would add to, and not substitute for, those services already provided by the local authority.

- The BIDs approach provides the opportunity to lever in private sector funding for the improvements and their subsequent management in addition to sources of local authority funding.

<u>City Centre Forum</u>

- A complementary initiative to the BIDS Scheme is to develop a City Centre Forum. This is identified in the City Centre Report prepared by the Council in 2009, as a forum comprising all of the key stakeholders with a view to agreeing an approach to the future management and enhancement of Waterford City i.e. adopt a development and management charter for the core City Centre area. Following on from this report, the “Destination Waterford” committee was established in 2010 to promote the marketing and branding plan for the City as a major retail, cultural and tourist destination. Effective City Centre management by all key stakeholders will be essential in creating a well planned, well designed and effective City Centre.

<u>Special Contribution Scheme</u>

- 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 quality and cost of City Centre parking has been identified as a critical issue in the success of City Centres. The lack of/cost of parking was also identified as an issue in the household and shoppers surveys undertaken (see Chapter 4). It is recommended that the City Council undertake a review of its parking charges and tariffs to ensure that the City retains its competitiveness with other retail centres, particularly those in the suburban areas of the City, the majority of which have no parking charges.

Image 8.1: Continued upgrading of streets required

Infill Development

- 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 necessitates. 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.

Ongoing Environmental Improvements to the Public Realm

- Waterford City has benefited from an ongoing programme of environmental improvement, maintenance and enhancement over the past number of years. The attractiveness of John Roberts Square is testament to the success of such ventures in providing a heart to the City. It is essential that such works are progressed further, particularly to the streets that radiate from the principle 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.

After Hours Activity

- 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.

Rates Base

- It is recommended that Waterford City Council carry out a strategic review of the existing rates base to ensure that it is line with current market and economic trends. This will be essential to protect and maintain existing retail operators in the City, particularly small independent retailers who contribute in such an important way to the retail diversity of the City.

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. Facilities for those with disabilities and the visually impaired should be incorporated in the design of the Environmental Improvement Scheme. 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. There are areas of the City such as Arundel Square that would particularly benefit from enhanced environmental works and landscaping.

- 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. In this regard it is recommended that the Council prepare a City Centre Litter Management Plan that ensures daily street cleaning and bin management.

City Quays

- The City Quays have significant development potential and their amenity and recreational value is not fully realised at present. There is potential for enhanced environmental improvements, better directional signage, traffic calming and improved pedestrian connections between the car parking areas and the City Centre. In this regard, a specific action plan should be drawn up for the future development of the quays investigating the feasibility of removing some of the surface car parking provision and its replacement with basement car parking. In the interim, these parking areas would benefit from hard and soft landscaping to soften their visual impact.

- As detailed in the City Centre report the connection between the quays and the City Centre needs to be further exploited and developed. As recommended in the City Centre Report, there is a need 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.

- Other measures to improve the Quays could include footpath widening to create an urban boulevard with tree planting and associated environmental improvements.

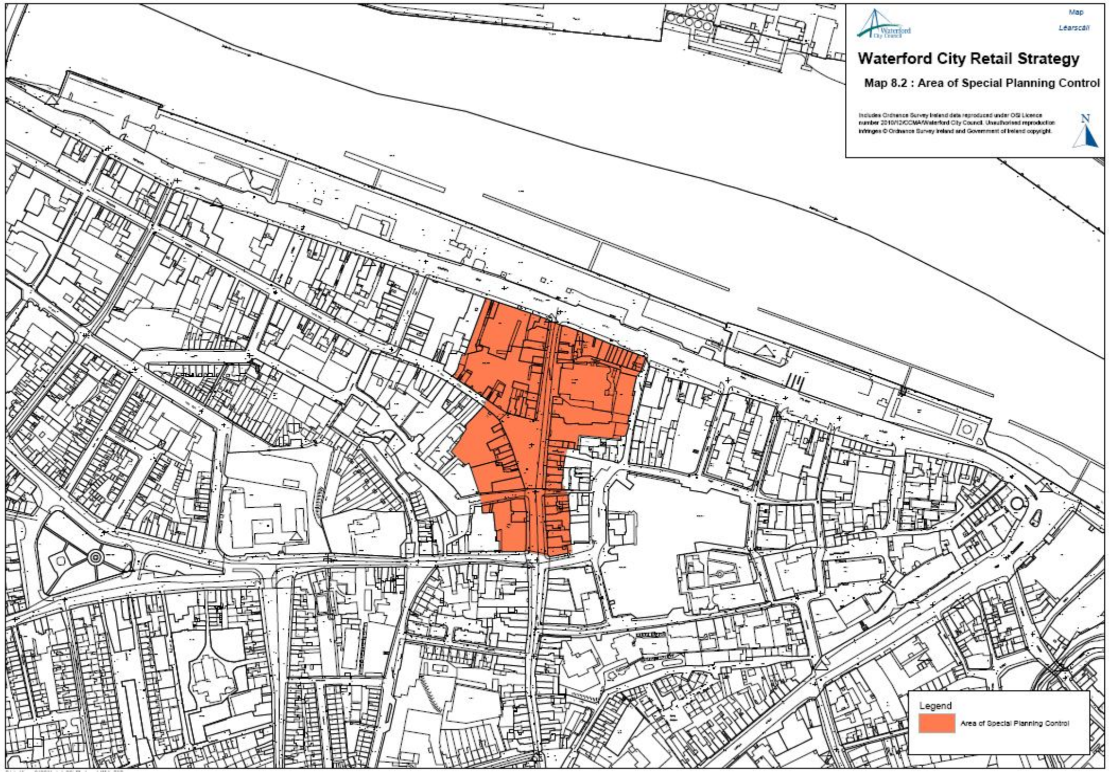
- It is envisaged that the development of the City Quays, both north and south will in the long term assist in the creation of a unique identifiable brand for Waterford as a Waterfront City with high quality retail, leisure, cultural and tourism facilities.

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 the creation of an Area of Special Planning Control. To facilitate this, the existing Architectural Conservation Area of the City would need to be expanded. It is recommended that this would extend to Barronstrand Street, John Roberts Square, Broad Street and a part of the South City Quays. It would apply to all retail properties with a direct frontage to these streets. Map 8.2 indicates the geographical area concerned.

- 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 pitch 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.



Map 8.2: Area of Special Planning Control

- The Special Planning Control Scheme could also make recommendations regarding advertising structures and de-exempt all signage and advertising structures both internal and internal 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 Local Authority 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

- The City 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. 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. Examples of some key sites include the former bank on O'Connell Street and the large Georgian property adjacent to the Port of Waterford Offices. A simple action such as painting a derelict building can significantly enhance the aesthetic profile of a street.

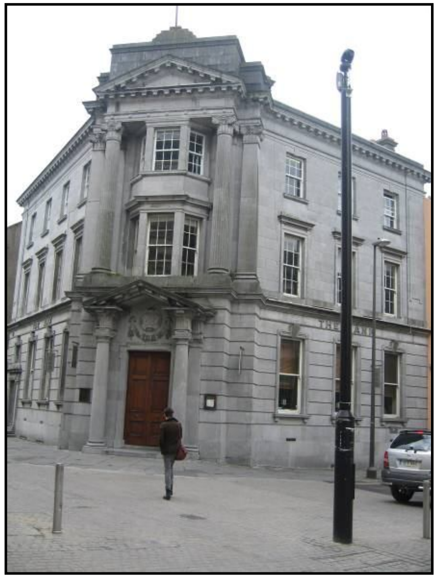


Image 8.2: Vacant Bank premises on O'Connell Street

- 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.

- In certain instances the use of CPO powers may be necessary in order to develop key derelict sites or to assist in the site assembly of strategic sites in the City core.

Improving Accessibility

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

⇒ Implement a marketed multi modal transport plan/green route proposal for the city centre to facilitate efficient improvements in access/footfall (underway).
⇒ Implement digital information systems regarding parking locations and availability (completed).
⇒ 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.
⇒ Improvement of signposting to multi storey car park in the City Square Shopping Centre (underway through operation of variable messaging system)
⇒ 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.

⇒ Other measures include investigating the feasibility of:

⇒ Widening of public footpaths in key City Centre areas such as the quays to improve the quality of the pedestrian environment and experience (green routes).

⇒ Enhanced pedestrian crossings (green routes).

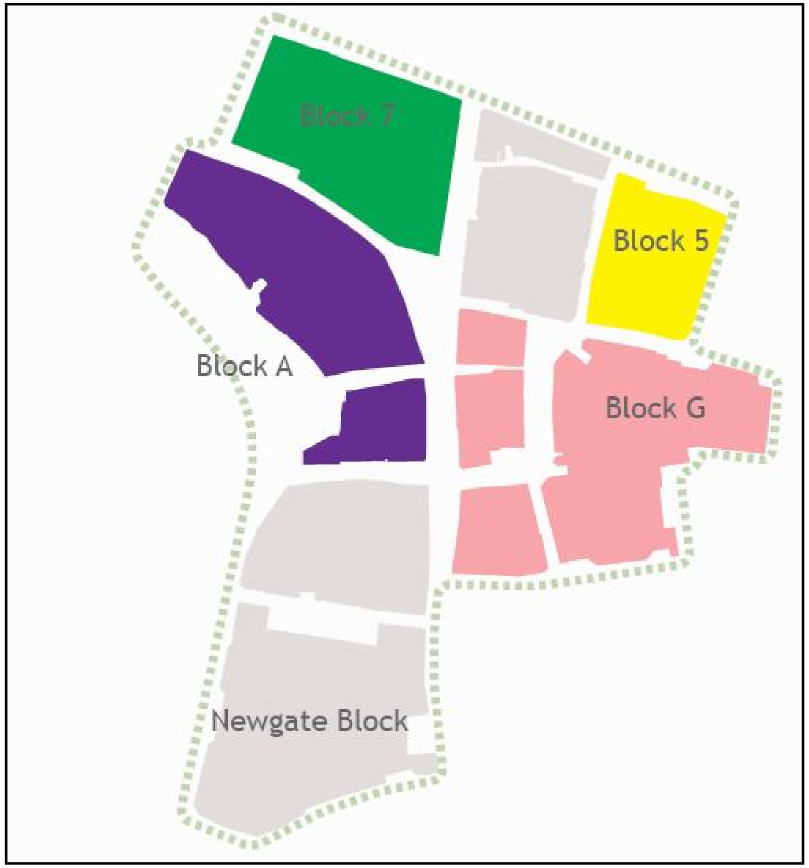
⇒ Improved cycle paths and cycle parking provision in the City area.

⇒ Removal of on street car parking in areas such as Arundel Square to allow for improvements and upgrading of the public realm.

In addition to these measures, the City Council commissioned the preparation of a Public Transport Feasibility Study in 2009. The report which was finalised in 2010 reviewed and rationalised alternative public transport systems from a cost efficiency and optimal suitability perspective for the City. The report included further measures to improve accessibility within the City from a public transport perspective.

<u>Archaeology</u>

- Waterford City has a rich historic legacy and much of the City Centre is located in an area of significant archaeological potential. Many developers see archaeology as a constraint and impediment to development. Archaeological heritage however, can add uniqueness and interest to a development and in some instances can be incorporated as a feature within development. In this regard it is recommended that the Council build on the initial archaeological report in the City Centre Report 2009 and prepare more detailed site specific investigative studies to facilitate developers who may wish to develop core sites in the City area.



Map 8.3: Extract from Waterford City Centre Report (Draft, 2009) showing specific opportunity sites

<u>Development of Specific Retail Opportunity Sites in the Core Shopping Area</u>

- There are a number of sites in the core shopping area which have the capacity to provide appropriate opportunities for accommodating large retail developments. These sites are identified in the City Centre Report prepared by the Council in 2009 and include:

Block 5 Area – This block is identified as having significant frontage to the Quays and accommodates a vacant site, 19th century warehouses and a mixed quality frontage to Conduit Lane. Proposals for the site include developing separate or assembled retail floorplates on the vacant site and behind the vernacular buildings, connecting across at high level to City Square or alternatively developing a multi storey car park.

Block 7 - on the South Quays - This site is currently occupied by three principle landholdings – Georges Court SC, the Granville Hotel and Shaws Department Stores. It is noted that all or part of this block could be redeveloped into a major addition to the shopping offer. In addition it could be linked to the establishment of new leisure or cultural activities that might be developed along the quays or riverside.

Block A – 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 City 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 stated that the former Cinema Building located in close proximity to The Cross has an obvious capacity to accommodate a major space user. Originally there was a street running along Jenkins Lane and this could be reinstated. It is noted that the redevelopment of this area would add to the richness and variety of the city centre retail core. Footfall could be captured down Patrick Street and there is the possibility of interesting architectural forms such as a glazed roof over Little Patrick Street. In terms of viability this is considered to be a key development site and one that should be further promoted and investigated by the Council.

Block G – This block contains the City Square SC and also the smaller units fronting onto Arundel Square, Peter Street and Broad Street. It is noted that the relative vibrancy of City Square is compromised by dated internal and external design, poor public realm in Arundel Square and some indifferent quality of building

Images: 8.3 and 8.4: Potential opportunity site comprising backland area around Jenkins Lane

Image 8.5: Existing linkage (currently closed) through site A to Georges Street

Image 8.6: Extensive buildings onto Georges St that could be incorporated into re-development

stock elsewhere in the block. The report identifies that there are opportunities to expand City Square upwards and outwards, to replace inappropriate existing fabric with new well designed retail and to improve the quality and appearance of Arundel Square.

Newgate Block - This block is closely linked to the principle shopping streets and accommodates an extant permission for a major city centre mixed use and retail scheme. The future of this development is uncertain, but 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.

Millar's Marsh Car Park - The core retail area also extends to include the Millar's Marsh car park site and Railway Square, a mixed use scheme anchored by TK Maxx. The Millars Marsh Car Park site is also in close proximity to the Poleberry Centre . It is a long rectangular site with river frontage. It is clearly an underutilised site and has the potential to be developed for a mixed use commercial and retail scheme that would have commercial synergy with adjacent retail uses. The redevelopment of this site for comparison retailing is considered appropriate.

- 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 core shopping area of 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.

- The development of the sites identified in the City Centre Report will be critical to ensure that Waterford can develop and improve its shopping attraction and in particular attract large national and international brand retailers, large department stores and variety stores.

- Of the sites identified, the Newgate Block and Block A (Jenkins Lane) offer perhaps the most significant opportunities for retail development and expansion. Block A is intrinsically linked to the traditional retail core and comprises a substantial backland area, much of which is in the ownership of the City Council. There are opportunities to effectively link these lands through the existing network of lanes to the city centre and to create commercial synergy with existing retail properties located along Patrick Street and Georges Street. The inclusion of properties fronting these streets is essential in order to create a site of sufficient size for a city centre scheme, to provide the necessary frontage to make retail uses viable, and to integrate the new retail provision with the traditional retail centre of the city. The inclusion of these properties will also enable good pedestrian flows between the new development and the existing principle retail attractions. There is also scope to incorporate further obsolete sites and backland areas of O' Connell Street into the redevelopment of this area. The Council may have to utilise their CPO powers to facilitate the development of these sites.

- If it is decided not to pursue major retail and city centre development projects in Waterford, or if there proves to be too many obstacles to their implementation, it is likely that the retail function of the traditional city centre streets will decline and erode.

- 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 retail opportunity sites at the edge of the core shopping area, particularly those identified below, including the Gasworks site and Bolton Street site, may be considered for comparison retail development where it can be clearly demonstrated that:

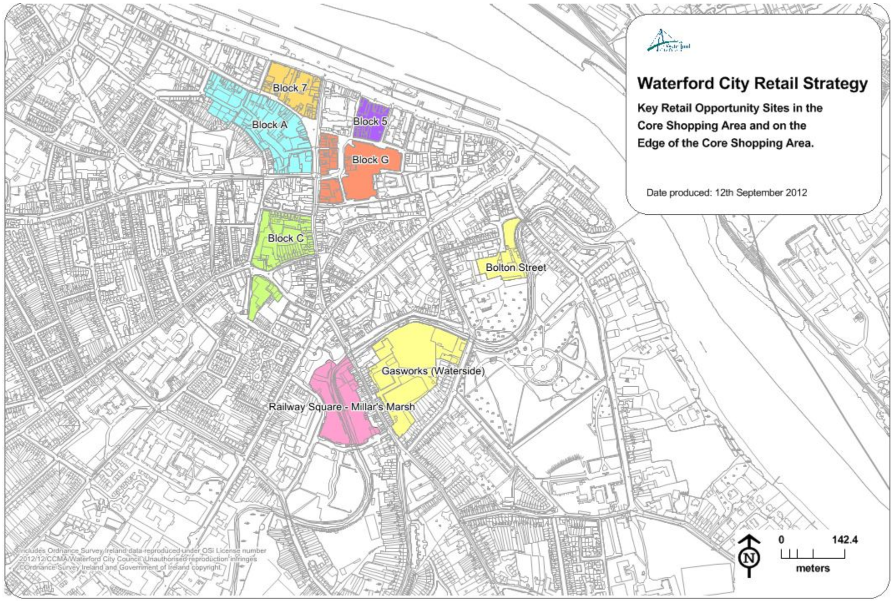
- the City Centre sites identified by the Council cannot be developed in the short term;
- that the development will not have an adverse impact on the vitality and viability of the City Centre;
- that the development will complement existing and proposed retail development in the city centre, create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

Edge of Centre Retail Opportunity Sites

The Gasworks Site

- As identified in Chapter 5, Waterford City has a rich historical legacy with many fine tourist attractions, including the landmark House of Waterford Crystal at the Mall. A challenge has always been the retention of tourist expenditure in the City area and the development of a sufficient range of complementary attractions and facilities to entice and encourage tourists to stay longer in the City. The House of Waterford Crystal is estimated to attract between 200,000 and 300,000 visitors per year. In addition,

Image 8.7: The Gasworks site



Map 8.4: Key Retail Opportunity Sites in the Core Shopping Area and Edge of Centre

Waterford will host the Tall Ships race this year which will attract in excess of 500,000 people to the City. In this regard, there is significant potential to harness tourist spend and to develop further specialist tourism retailing and leisure facilities in the City.

- In this regard, it is recommended that the Gasworks site may be a suitable location for a specific integrated tourism, leisure and retail development. It is a significant site, located at the edge of the City Centre, in close proximity to the Mall. The site has significant water frontage and is also located in close proximity to the City Centre.

- It is envisaged that this site may be suitable for a specific niche tourism/retail development that would maximise the sites location and attract tourist spend.

- The nature and type of retailing developed at the Gasworks site would need to be strictly controlled to ensure that it is specifically tourist related and specialised in nature. The success of such a development on this site would also be dependent on the creation of clear linkages and connections with other tourist attractions and facilities in the City.

Bolton Street Car Park Site

- The Bolton Street site is a prominent city centre site within minutes walking distance of the main shopping district, the Quay, the City Park and the civic offices of Waterford City Council. It is considered an edge of centre site.

- Apart from the attractive and central location,. The extensive frontage to the Johns River and the peoples park make this site a suitable opportunity site for retail development.

- A detailed urban design framework for the future development of the Bolton Street site has been prepared by the Council. Cognisance of this design brief should be had in any future development proposal for the site.

8.6 SPECIFIC OBJECTIVES FOR DISTRICT CENTRES, NEIGHBOURHOOD CENTRES, RETAIL WAREHOUSING AND LOCAL SHOPS

District Centres

8.6.1 There are three District Centres in Waterford City, namely Ardkeen/ Farronshoneen, Lisduggan (Waterford SC), and Kilbarry. A fourth district centre has developed on the edge of the City within the administrative area of Kilkenny County Council. All are trading well and have good occupancy, with the exception of Ferrybank which is currently vacant. It is also proposed to designate the Hypercentre at Morgan Street as a District Centre.

8.6.2 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.

8.6.3 Lisduggan is a centre that is clearly 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. The redevelopment and upgrade of the Hypercentre should also be actively encouraged.

8.6.4 The development of comparison floorspace, particularly high order comparison should be strictly controlled and monitored in the district 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

8.6.5 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.

8.6.6 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.

8.6.7 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. Having regard to the limited site area at Kilcohan neighbourhood centre, it is considered appropriate to provide for additional neighbourhood centre expansion in the area. In this regard the existing Salvage Shop site off Airport Road with an extant neighbourhood centre permission can accommodate any future local service needs of the immediate area. Accordingly the General Business zoning thereon should be maintained and the site be classified as a joint neighbourhood centre for the area.

8.6.8 The proposed neighbourhood centre at Knockboy is not yet constructed. It is recommended that a neighbourhood centre if progressed 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.

8.6.9 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.

8.6.10 In Carrickpheirish, there are extant permissions for two neighbourhood centre developments both anchored by a convenience unit of 1,606 sq. metres (net) and 1,123 sq. metres (net) respectively. Whilst it is unusual that a designated neighbourhood centre would accommodate two such developments, the schemes have been facilitated by the 2007 Development Plan which allowed for the development of medium sized anchor supermarkets of 1,600 sq. metres net to be permitted within the designated neighbourhood Centres.

8.6.11 It is noted that neither development has been constructed and it is likely that the market will ultimately dictate whether there is a demand for two such facilities at this location. There should be a presumption against further convenience development at this location and the combined total of convenience floorspace at this location should not exceed 3,000 sq. metres (net). Any revised proposal for neighbourhood centres at this location should be carefully considered to ensure that the design of such a scheme is designed to provide a focal point for the community and is integrated with the surrounding residential area.

Retail Warehousing

8.6.12 Extensive areas of retail warehousing have been developed or have permission in the Waterford City Area and its environs. As noted the Butlerstown Park is the only operating park at present, and it is not fully occupied. It is situated in the County Council administrative area. A further park has been constructed at Six Cross Road (The Waterford Retail Park) but is currently vacant. In addition there are ambitious extant permissions for further retail warehousing at the Cork Road and Airport Road. It is noted that the latter two schemes remain undeveloped, and in time these permissions may become modified to allow for more modest development. Nonetheless, it is envisaged that there is sufficient zoned land to cater for retail warehousing development over the forthcoming plan period.

8.6.13 It is noted that the Tramore Road is also characterised by extensive areas of retail warehouse development. Some of the properties are dated and would benefit from redevelopment. The Council should promote the redevelopment of such sites as appropriate and will support retail warehousing at this location.

8.6.14 The Council should be proactive in enforcement in the Tramore Road/ Inner Relief Road particularly in relation to unauthorised signage and other inappropriate development. It is recommended that the Council prepare a signage brief to assist existing and proposed retailers in this area.

8.6.15 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

8.6.16 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 City Development Plan contains a specific objective to preserve Ballybricken as an important local shopping destination. The City Council should also prepare and Action Area Plan which would detail a range of measures aimed at upgrading the visual appearance of the area including enhancements to the public realm and open space area, hard and soft landscaping, better parking arrangements, shop front design and presentation etc.

8.7 OVERALL CONCLUSIONS

8.7.1 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.

8.7.2 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.

8.7.3 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.

8.7.4 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.

8.7.5 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.

8.7.6 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.

8.7.7 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.

8.8 VISION FOR THE FUTURE

8.8.1 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; 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 is developed fully in accordance with its designation as a Gateway City.

BOX 8.2: 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.
- 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.
- Prepare 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 existing ACA and the introduction of an 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.
- Prepare detailed archaeological studies and survey for key City Centre regeneration sites.

District Centres

- Promote the ongoing upgrading and maintenance of existing District Centres.
- Prepare Action Brief for Lisduggan for interim environmental improvement works pending its redevelopment.
- Discourage the development of higher order comparison floorspace in District Centres to protect the primacy of the City Centre.
- Promote the re-development of the Hypercentre at Morgan Street.

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. Promote the development of the Salvage Shop site for future neighbourhood centre expansion.
- Restrict the scale of convenience floorspace at Knockboy to 1,500 sq. metres net. if developed as a neighbourhood centre.
- 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

- The City is well served by retail warehousing.
- It is recommended that retail warehouse provision is met in these existing and planned retail parks or else in the vicinity of the Tramore Road/Inner Relief Road which is also characterised by this type of development.
- Prepare signage brief for Tramore Road area and ensure strict enforcement against unauthorised development.
- Conditions should be imposed in such developments clearly restricting the sale of goods to bulky household items.

Local Shops

- Promote the development of local shops in the City and ensure the preservation of Ballybricken as an important local retail destination.
- Prepare an Action Area Plan for Ballybricken to promote improvements to the public realm and central open space.

CHAPTER 9

Criteria and Actions for Assessing Future Retail Development Proposals

9.1 INTRODUCTION

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

9.2 CRITERIA FOR ASSESSING FUTURE RETAIL DEVELOPMENT

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

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

The Sequential Test

9.2.3 It is stated in the Retail Planning Guidelines:

"The second national policy objective is to promote greater vitality in city and town centres by promoting a sequential approach to retail development. Sequential development means that:
1. The overall preferred location for new retail development is within city and town centres. Retail development may also be appropriate within District Centres identified in the settlement hierarchy at a scale appropriate to the needs of the area. See Section 3.4 - District Centres; and
2. Subject to the requirements below, only where the applicant can demonstrate, and the planning authority is satisfied, that there are no sites or potential sites within a city, town centre or designated district centre should an edge-of-centre site be considered. In addition, only in exceptional circumstances where it can be demonstrated that there are no sites or potential sites available either within the centre or on the edge of these centres should an out-of-centre site be considered". (Section 2.5.2).

9.2.4 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 Centre is lodged to the planning authority, the applicant should demonstrate that all City Centre options have been assessed and evaluated and that flexibility has been adopted by the retailer in regard to the retail format. In particular the key opportunity sites identified in the City Centre Core Report must be investigated.

9.2.5 In addition to the sequential test, the Retail Planning Guidelines recommend that the applicant should address the following criteria (Section 4.9)):

- support the long-term strategy for city/town centres as established in the retail strategy/development plan, and not materially diminish the prospect of attracting private sector investment into one or more such centres
- have the potential to Increase employment opportunities and promote economic regeneration
- have the potential to increase competition within the area and thereby attract further consumers to the area
- respond to consumer demand for its retail offering and not diminish the range of activities and services that an urban centre can support
- cause an adverse impact on one or more city/town centres, either singly or cumulatively with recent developments or other outstanding planning permissions (which have a realistic prospect of implementation) sufficient to undermine the quality of the centre or its wider function in the promotion and encouragement of the arts, culture, leisure, public realm function of the town centre critical to the economic and social life of the community
- cause an increase in the number of vacant properties in the primary retail area hat is likely to persist in the long term
- ensure a high standard of access both by public transport, foot and private car so that the proposal is easily accessible by all

sections of society; and/or

- link effectively with an existing city/town centre so that there is likely to be --commercial synergy.

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

- That there is a quantitative and qualitative need for the development.
- The contribution of the development towards the improvement of the city 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 against other competing centres.
- Compliance with development plan policies and objectives.
- The development is easily accessibly by the elderly and disabled/ mobility impaired.

9.3 CRITERIA FOR ASSESSING PARTICULAR TYPES OF DEVELOPMENT

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

Convenience Food Shopping

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

9.3.3 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.

9.3.4 The maximum size of convenience floorspace in supermarkets in the City is 3,500 square metres net sales as defined in the Retail Planning Guidelines. 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 centres and the City Centre.

9.3.5 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 Centres

9.3.6 It is unlikely that there will be a requirement for further district centre development in the City due to the modest population projections predicted in the Regional Planning Guidelines. Capacity is likely to be met in the vacant Ferrybank development and at Lisduggan which has significant potential for redevelopment and permission for expansion.

9.3.7 District Shopping Centres play an important role in the City retail offer, especially in the convenience provision within the City.

9.3.8 As detailed in section 8 it is important to consider the scale and extent of such centres and their potential impact on the City Centre. District 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 Centres in Waterford due to their potential adverse impact on the City Centre.

Retail Warehouse Parks

9.3.9 It is recognised in the Retail Planning Guidelines that there are benefits to be gained in grouping retail warehouses in retail parks so that the number of trips by car are minimised. The Guidelines also recognise that many bulky goods stores such as furniture stores can and are accommodated in city and town centres. It is therefore considered appropriate to group these facilities into planned retail parks on the edge of the town centre if such sites are available. It should be noted however that the Retail Planning Guidelines provide a general presumption against further retail warehouse development in out of centre locations. Such development should only be permitted where it can be demonstrated that there are no city centre or 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.

9.3.10 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.

9.3.11 It is unlikely that there will be a demand for further retail warehousing floorspace in Waterford in the short term. Extant permissions exist for extensive retail warehousing development and there is a constructed and vacant park at Six Cross Road.

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Outlet Centres

9.3.12 It is stated in the Retail Planning Guidelines that the success of these centres depends on attracting customers from a wide catchment area and from the tourism sector. The guidelines note that locating such centres on out of town greenfield sites can result in the significant diversion of expenditure away from the established city centre area. However, such centres located within or immediately adjacent to the city centre can generate commercial synergy with established retail outlets. Consideration must be given to the range and type of goods sold at such centres to ensure that they do not compete with the traditional town centre area.

9.3.13 Criteria for assessing such development should focus on whether the development is located in a strategic location to capture expenditure from a very wide catchment area and must be assessed in accordance with the sequential test.

9.3.14 As noted in the Retail Planning Guidelines, outlet centres are generally unsuccessful in close proximity to large urban centres because retailers so not normally choose to trade at a large discount in direct competition with their high street outlets.

9.3.15 The most appropriate location for outlet centres is likely to be where commercial synergy can be achieved between an outlet centre and an urban centre which would lead to economic benefits to the overall area.

9.3.16 In this regard such developments should preferably be located adjacent to or even within an existing town/city centre. Outlet centres are not appropriate in more remote out of town locations.

9.3.17 As such facilities are primarily geared towards the car borne customer, vehicular accessibility and adequate car parking are key factors to consider.

9.3.18 An outlet centre may be appropriate in Waterford City where it is located in a City Centre or an edge of centre site location with good potential for commercial synergy with the City Centre.

Local Shops and Petrol Filling Stations

9.3.18 Local shops play an important role in providing for daily top up shopping. They are also often easily accessible to the elderly and disabled. Areas such as Ballybricken provide a community focus and range of retail services and facilities. The development of such local shops should be encouraged in the residential areas of the City. Such developments should be designed to a high standard and be easily accessible to all sections of society.

9.3.19 As stated in the Retail Planning Guidelines, the size of such retail units should not exceed 100 sq metres net. Where permission is sought for floorspace in excess of 100 sq. metres, the sequential approach to retail development will apply in the assessment of such proposals.

Appendix 1 Retail Sales Index April 2011