WATERFORD CITY RETAIL STRATEGY

EXECUTIVE SUMMARY

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1.0 CHAPTER 1: INTRODUCTION

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.

1.2 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 The formulation of a detailed retail strategy is 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.

2.0 CHAPTER 2: POLICY ANALYSIS

2.1 The purpose of this chapter in the retail strategy 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. National, Regional and County policy documents are reviewed.

National Policy

2.2 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.

Regional Policy

2.3 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.

Local Policy

2.4 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 form 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 2009 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 streetscape 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.

3.0 CHAPTER 3: ECONOMIC AND POPULATION CONTEXT AND RETAIL TRENDS

3.1 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.

3.2 At a national level, 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.

3.3 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.

3.4 As would be expected, retail sales have been affected by the downturn. The CSO March 2011 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. The growth in clothing and footwear is positive in terms of future retail development and expansion.

3.5 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.

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

3.7 This growth in population will have significant implications for Waterford City. 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 also appropriate in the context of the City's designation as the gateway to the region.

3.8 A review of retail trends has revealed:

- Shopping has become interlinked with social and leisure activities.
- Online shopping is increasing.
- Convenience retailers are seeking larger units and often now include a significant comparison element in their stores.
- There is increasing competition from discount convenience retailers.
- The convenience retail market is dominated by a limited number of retailers.
- Convenience operators are demonstrating a preference for locating in out of centre locations.
- There is an increasing prevalence of ethnic shops and farmers markets.
- Consumers are price conscious and value driven.
- Comparison retailers are also seeking larger floor plates and often try to decentralise to out of town locations where such types of floorspace are readily available.
- There is now a far greater presence of European and International multiples in the Irish retail market.
- There is increasing polarisation of comparison retailing investment into the larger retail centres.
- Factory outlet centres have begun to develop in Ireland.
- Fashion parks are a new retailing concept that is beginning to emerge.
- There is a recent trend towards broadening the range of goods sold in retail warehouse parks, including convenience goods and large scale comparison shopping.

3.9 In terms of retail trends, the retail market has continued to diversify to meet new and evolving demands. Such evolution and diversification will need to continue into the future to combat the difficult economic climate and increased competition from international retailers in both the comparison and convenience markets.

3.10 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 the city in terms of products and goods on sale.

3.11 In conclusion, there is a requirement to ensure that Waterford City is placed in a strong position to benefit from the predicted national recovery. The provision of appropriately located retail services and facilities can make a contribution in this regard.

4.0 CHAPTER 4: SURVEY APPROACH AND ANALYSIS

4.1 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

Floorspace Study

4.2 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.

4.3 There have also been developments implemented within the City Suburbs in recent years. 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. It should be noted that for the purpose of this study, the floor areas relate to the net retail floor area.

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

Household Survey

4.4 A comprehensive survey of households in Waterford City Council catchment area was undertaken in April 2011 by Demographics Ireland. The objective of this study was to follow the existing shopping patterns within the catchment area of Waterford. The total sample in this survey is 500 households.

4.5 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.

Convenience Shopping

4.6 In terms of the main food shop, the results of this illustrate the prominence of the suburban centres as convenience shopping destinations with 23% of those from Waterford City doing their main food shopping in Tesco Ardkeen and 11% of respondents from the City doing their main convenience shopping in Superquinn the Kilbarry Centre. There is also a 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 minute drivetime isochrone also carry out their main grocery shopping within the City.

4.7 The results of the household questionnaire demonstrate a high level of satisfaction with existing grocery shopping facilities within Waterford. When asked if they were satisfied with the existing convenience provision within Waterford 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.

4.8 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.

Comparison Shopping

4.9 In terms of shopping for clothes and footwear, it was found that the majority of respondents within the Study area travelled to Waterford City to carry out their main clothes and footwear shopping than to any other centre. 46% of those surveyed travelled to areas within the City Centre for this purpose.

4.10 However, 50% of the respondents carried out their main clothes and footwear shopping in competing centres such as Kilkenny (31%), Wexford (6%), Cork (3%),Other Places (1%), Clonmel (3%), Dungarvan (1%) and New Ross (1%).

4.11 However, a more detailed analysis on an area based breakdown illustrates that Waterford is the main destination for over 90% of respondents within a 30 minute 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 drive time travelling to Kilkenny and 58% within the 45 to 60 minute drivetime (although it is noted that a portion of the catchment falls within County Kilkenny and Kilkenny City). These results indicate however, that Waterford City may not have sufficient attraction to draw persons from the wider catchment area, and that a notable percentage of 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.

4.12 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.

4.13 A number of reasons for dissatisfaction were given by the respondents who outlined that they were dissatisfied or very dissatisfied with the existing comparison retail provision within Waterford. These include "poor range of goods" (81%), "too expensive" (4%) and "poor shopping "environment" (4%). 4% of the respondents also outlined that they would like a Marks and Spencer.

Bulky Household Goods Shopping

4.14 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, 6.7% of respondents also noted that they did their main furniture shopping in Harvey Norman.

4.15 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%).

4.16 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

4.17 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. 21.6% stated that they shopped in Dublin, 54% in Kilkenny and 20.7% in Cork.

4.18 The breakdown of responses per geographical area is considered significant when assessing the above results. Kilkenny City exerts a significant pull within the City to 30 minute, 30-45 and 45 to 60 minute drivetime. 46% of the respondents from the City to 30 minutes catchments shop in Kilkenny and in the 30 – 45 minutes catchment 50% shop in

Kilkenny.

Improvements to Waterford City

4.19 Respondents were also asked what improvements could be made to the shopping experience in Waterford City. Improved parking, a Marks and Spencer Store and a better range of shops were ranked as some of the most frequent responses.

Conclusions

4.20 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.

4.21 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 from the City.

4.22 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.

4.23 The survey results however, also reveal the attraction of other competing centres, particularly Kilkenny for respondents. 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 catchment area and in this regard it is not fulfilling its role as a regional gateway.

4.24 The survey results also demonstrate the desire for a more diverse range of retail outlets within the City Centre. Marks and Spencer's is specifically mentioned in this context.

Shoppers Survey

4.25 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. 200 surveys were undertaken.

4.26 Respondents were asked the main purposes for their trip to Waterford. 196 of the respondents were in the City for shopping, 122 noted that they live in Waterford and 38 outlined that they work in the City. The high proportion of respondents visiting the City for retail purposes is positive and is an indication of the important retail role and function of the City.

4.27 Respondents were asked to identify their main reasons for visiting Waterford City. 13% of respondents were in Waterford City to do their main grocery shop and 14.5% were browsing around the shops. 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%).

4.28 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".

4.29 Respondents were also asked what areas and streets they visited on their visit to the City Centre. The results of this survey clearly demonstrate the prominence of the City Square Shopping Centre, with 81% of respondents visiting this centre. Barronstrand/Broadstreet were also frequented with 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.

4.30 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" were ranked as the top 3 attractions of the City. The pedestrianised streets and choice of cheap discount shops also ranked highly.

4.31 Respondents were also asked to list what three improvements would encourage them to shop in Waterford City more often. The improvements most frequently mentioned were "free/cheaper parking", "more shops", "more parking" and "improvements to the streetscape".

5.0 CHAPTER 5: HEALTH CHECK ASSESSMENT

5.1 This section of the report provides an overview of the retail profile and health check assessment of Waterford 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.

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

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

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

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

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

In order to determine the vitality and viability of Waterford City Centre and the following indicators were utilised:

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

Health Check Assessment

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

5.5 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.

5.6 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 "Destination Waterford" Committee established in 2010 was formed to further develop the tourism role and function of the City. The City is home to major cultural and sporting activities including the Spraoi Festival. The City also hosted the Tall Ships Race this year. There is clear 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.

5.7 Waterford City is a major transport terminus and has excellent accessibility. It is noted however, that 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 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 advantageous, however, as noted in the City Centre Report prepared by Waterford City Council in 2009, 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.

5.9 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 should be a matter of priority. Cycling facilities in the City are poor.

5.10 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, Galway 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.

5.11 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. The introduction of this measure would require the extension of the existing ACA to include the prime retail streets in the City Centre.

5.12 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 terms measures such as painting the exterior of such structures could be considered to improve their visual appearance.

5.13 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.

Waterford City Suburban District Centres

5.14 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 poor 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 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 although fully constructed, 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.

5.16 Existing district centres in the City have not followed the trend of other district centres in other parts of the country, particularly in Cork and Dublin which have come under pressure to redevelop in recent years and develop much more extensive retail, retail service and leisure facilities. 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 effected 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.

5.17 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 study recommends the designation of the Hypercentre at Morgan Street as a District Centre.

Waterford City Neighbourhood Centres

5.18 There are four 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. There is also potential to develop a further neighbourhood centre at the Salvage Shop site, Cork Road. All are generally successful centres with good occupancy, although Ballybeg would benefit from the development of further small scale localised retail facilities and services in time in order to complement existing 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.

5.19 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.

5.20 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.

Retail Warehouse Development in Waterford

5.21 Waterford is well served by retail warehouse development. The Buttlerstown Retail Park is the only fully developed retail park in the City (located within the administrative area of Waterford County Council), 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.

6.0 CHAPTER 6: ASSESSMENT OF COMPETING CENTRES

6.1 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.

6.2 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.

6.3 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 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. This may 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.

6.5 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 noted the draw of Kilkenny is a concern and there is clearly a need for the City to develop and enhance its offer in this regard.

6.6 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.

6.7 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 relatively 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.

7.0 CHAPTER 7: QUANTITATIVE ANALYSIS

Introduction

7.1 This section of the report 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.

7.2 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 should to be achieved 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.

7.3 It should be noted that the figures set out in this section of the report 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.

Approach

7.4 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.

Definition of the study area

7.5 The study area 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 areas.
- 30-45 minute isochrone from the city centre.
- 45-60 minute isochrone from the city centre.

Floorspace Capacity

7.6 The future floorspace requirements for additional convenience, comparison and bulky goods floorspace within the catchment are illustrated in the table opposite.

7.7 Two different growth scenarios are used. Under the low growth scenario the retention and inflow of expenditure to Waterford City Centre remains at current levels over the lifetime of the retail strategy. Under the second scenario, the level of trade draw from the 0-30, 30-35 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.

7.8 It can be seen from the Table 7.1 that the capacity for additional convenience floor space within the City area is 5,647 sq. metres 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 floorspace (i.e. less than 1,500 sq. metres net) within or close to the existing designated centres 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 7.1 indicates a requirement for an additional 33,685 sq. m. and 38,490 sq. m. of comparison floorspace by 2022. Table 7.1 illustrates no requirement for additional bulky goods floorspace by 2022. This is not surprising having regard to the extent of this format of retail floorspace recently developed within the Waterford City area.

Table 7.1 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

8.0 CHAPTER 8: POLICIES AND ACTIONS

8.1 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.

8.2 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.

Retail Hierarchy

8.3 The Retail Hierarchy within Waterford City as indicated in Box 8.1 opposite.

Definition of the Core Retail Area

8.4 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.

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**:**

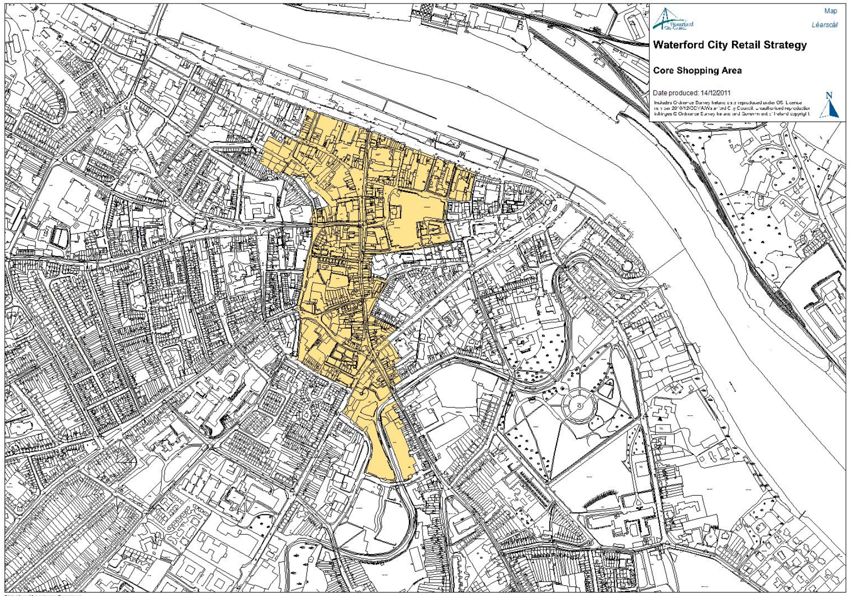
- Ardkeen/Farronshoneen
- Waterford Shopping Centre, Lisduggan
- Kilbarry, Tramore Road
- Ferrybank District Centre Abbeylands (in the administrative area of Kilkenny County Council)
- Caufields Hypermarket Morgan Street

Third Tier – **Neighbourhood Centres**.

The identified Neighbourhood Centres are:

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

Fourth Tier - Local Shops



Distribution of Floorspace Requirements

8.5 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.

8.6 The figures set out in the quantitative analysis in chapter 7 should not be considered as upper limits, merely as indicative of the scale of floorspace required to meet the needs of existing and future population 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.

8.7 It is acknowledged that it may not always be possible to locate large scale convenience retail provision in the City due to their large floor plate requirements. In this regard, edge of centre locations in appropriate commercially zoned locations or within planned and existing neighbourhood and district centres are also considered appropriate locations for such development. However, future comparison floorspace should be targeted to the City Centre core retail area. It is acknowledged that the development of key city centre sites poses many challenges and in this regard, comparison development may be considered on appropriate edge of centre sites where it can be clearly demonstrated the development would not have an adverse impact on the City Centre; that the development has the potential to create commercial synergy and would complement the existing and proposed retail structure of the City; where the development can be shown to enhance pedestrian and public transport connections with the City Centre.

8.8 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. In addition Millars Marsh has been identified as a potential retail opportunity site and is also an appropriate location for retail development. In this regard there should be a clear presumption against the development of high order comparison floorspace in the suburban areas of the City and in planned and existing district and neighbourhood centres.

8.9 In terms of retail warehouse development, the City is well served in terms of bulky household provision. There is an existing retail park at Buttlerstown (in the administrative area of Waterford County Council) 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.

8.10 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.

Specific Objectives for Waterford City Centre

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.
- 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.
- Promote the re-development of the Hypercentre at Morgan Street.

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.

9.0 CHAPTER 9: CRITERIA FOR ASSESSING FUTURE RETAIL DEVELOPMENT

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

9.2 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 in accordance with the strategy.

9.3 All applications for large retail developments (in excess of 1,000 sq. metres – net area) should be subject to the sequential test. Where an application for a large retail development (in excess of 1,000 sq. metres – net area) outside of the 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. The exception to this approach is retail warehouse development that are restricted to the sale of bulky household goods as it is identified in the Retail Planning Guidelines that such developments are better suited to peripheral locations on the edge of a town centre. Such development should be targeted to one of the 4 identified retail parks in the City.

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

- Support the long term strategy for city/town centre 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 development ort 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 area that is likely to persist in the long term;
- Ensure a high standard of access both by public transport, foot and private car so that the proposal is easily accessible by all sections of society; and / or
- Link effectively with an existing city/town centre so that is likely to be commercial synergy.

9.5 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.

9.6 Criteria for assessing planning applications for different types of retail developments are also included in the strategy including:

- Convenience Food Shopping
- District Centres
- Retail Warehouse Parks
- Factory Outlet Centres
- Retail Warehouse Clubs
- Local Shops and Petrol Filling Stations

10.0 CONCLUSION

10.1 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.

10.2 The City is under increased threat from competing centres, not only in the immediate region, but also at a wider level from 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. There is already evidence of expenditure leakage to Kilkenny.

10.3 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 and Galway. 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.

10.4 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 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.

10.5 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.

10.6 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.

10.7 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.

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

Vision for the Future:

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.