Kilkenny County & City Development Plan Retail Strategy 2020

FINAL

on behalf of Kilkenny County Council

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1.0 Introduction

Overview

1.1 Nexus Planning (Nexus) has been commissioned by Kilkenny County Council to prepare the Kilkenny County and City Development Plan Retail Strategy 2020. The Strategy will form part of the Kilkenny County Development Plan 2021-2027 ('the Development Plan').

1.2 The Development Plan is intended to set out the overall strategy for the future planning and sustainable development of the County for the period of the plan and beyond.

1.3 The purpose of the Retail Strategy is to set out clear, evidence based objectives and policies in relation to retailing, in order to support competitiveness and choice whilst promoting the vitality and viability of town centres. The Strategy focusses on Kilkenny City as the primary retail destination within the County, however also considers retailing in the four district towns of Callan, Castlecomer, Graiguenamanagh and Thomastown, as well as Ferrybank.

1.4 The Strategy is underpinned by empirical evidence in the form of a 550-sample shopper survey. The shopper survey allows us to undertake a qualitative analysis of shopper attitudes and opinions. The survey was purposefully based on a survey carried out in 2010 to support the previous Retail Strategy, in order to allow direct comparison to the previous results. The 2010 survey was only carried out in Kilkenny City.

Scope of Works

1.5 The brief sets out that the Retail Strategy shall at a minimum include the following:

i) A succinct section on national and regional retail policy and trends and their implications for the city and county Retail policy;
ii) Outline the level and form of retailing activity appropriate to the various components of the settlement hierarchy;
iii) Define, by way of a map, the core retail area of each centre as appropriate;
iv) Analysis of the change that has occurred in retailing in County Kilkenny since the last Plan/Strategy;

v) A comparative review of Kilkenny City with other major competing centres;
vi) Set out strategic guidance on the appropriate 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;
vii) Identify opportunity sites in each of the main towns which could be used to suit a variety of required retail formats in a way that maintains the essential character of the particular shopping area;
viii) Include objectives to support action initiatives in town centres;
ix) A Viability and Vitality Assessment check shall be carried out for each of the six settlements;
x) A review of 'Out of Centre' retailing in Kilkenny City, and whether or not there is potential for expansion;
xi) Preparation of a suite of policies necessary for ensuring vital and vibrant town and village centres.

Structure of the Study

1.6 In light of the above, we have structured our report as follows;

- **Section 2** summarises key national and regional retail policy, and key current and future retail and leisure trends, therefore providing the context for this Study and how it can be used to guide plan-making;
- **Section 3** examines the vitality and viability of the main centres within the County. We review our empirical shopper survey findings and consider health-checks of the County's main centres;
- **Section 4** provides discussion around the key policy topics including settlement hierarchy, core retail areas, and out of centre retail, and provides a comparative review of Kilkenny City with other major competing centres;
- **Section 5** sets out our recommendations and policies in respect of the Council's future strategies for retail, town centre and leisure development.

2.0 Policy & Trends

2.1 In this section, we provide a succinct account of current national and regional policy relevant to retail planning. Further, we review current and future retail trends to provide a context for the preparation of this Strategy, and an understanding of the implications of these trends for future county retail policy.

National and Regional Retail Policy

National Planning Framework 2018

2.2 At the national level, the National Planning Framework 2018 (NPF) guides all development within Ireland until 2040. The National Planning Framework (NPF) does not provide specific guidance on the national retail strategy, but provides broader guidance on achieving sustainable cities and communities, as well as regionally specific guidance to help promote growth and sustained development.

2.3 The NPF contains strategic policies seeking to ensure the vitality and viability of Ireland's urban and rural places. National Objective 6 is part of a series of objectives that seek to strengthen Ireland's urban places. Objective 6 relates to the role and function of urban places, highlighting the Government's ambition to regenerate and rejuvenate cities, towns and villages as environmental assets to ensure the resiliency and vitality of urban places. This includes ensuring their ability to accommodate increased populations, employment activity, and high amenity and design standards. National Objective 11 sets out a presumption in favour of development that will encourage people, jobs and activity within existing urban places of all sizes.

2.4 National Policy Objective 16 highlights the Government's intention of addressing vacancy rates in small town and village centres to reduce rural decline, and encourage the viability and vibrancy of rural areas.

2.5 The NPF provides a hierarchy for commercial activity based on settlement size. Smaller settlements and rural areas are identified as those which provide commercial infrastructure at local scale, appropriate to their size, including a shop, pub, post office and petrol station. Smaller towns and villages are identified as those with supermarkets, restaurants, and a mix of retail facilities, whilst large towns are those providing shopping centres, retail warehousing, and a range of restaurants. Finally, cities provide commercial retail infrastructure at the scale of department stores, as well as specialist shops, and arts and cultural facilities.

Retail Planning Guidelines 2012

2.6 The Retail Planning Guidelines (2012) prepared by the Department of the Environment, Community and Local Government (DECLG) provides policy guidance to help promote and maintain the vitality and viability of the retail sector as a key element contributing to the success of Ireland's urban places, villages, and the country as a whole.

2.7 The 2012 Retail Planning Guidelines document identifies the overarching objective in retail planning in Ireland to be enhancing the vitality and viability of city and town centres through the application of sequential development, requiring retail development to be appropriate to the scale and function of the settlement to which it is to be located. To this effect, the Retail Planning Guidelines set retail floorspace caps on a hierarchical basis, to help promote competitiveness and diversity in the retail sector. In Kilkenny, the convenience retail floorspace cap is 3,000 sq m (applicable to new retail stores or extensions to existing stores which will result in aggregate increase in net convenience floorspace). The cap on retail warehouse floorspace in Ireland is 6,000 sq m with specific exceptions for city and town centre areas in the five National Spatial Strategy Gateway cities (which includes Waterford but does not include Kilkenny), whilst the cap for petrol filling station shops is set at 100 sq m.

2.8 Finally, the 2012 Retail Planning Guidelines document identifies the important contribution high quality design of retail development can have on supporting the vitality and attractiveness of urban centres.

A Framework for Town Centre Renewal

2.9 The Framework for Town Centre Renewal[1] is a document developed from working groups to cultivate strategies aimed at securing vibrant and resilient town centres through town centre renewal. At the centre of this goal, is the importance of the retail sector and its role in supporting town centres, communities and job creation.

[1] A Framework for Town Centre Renewal, Department of Business Enterprise and Innovation 2017

2.10 This framework identifies the key attributes of successful towns, and provides an action plan and support for town centre renewal. The key driver of the framework's strategy is stakeholder engagement and a community-led approach to developing a bespoke town centre plan that aims to support its vitality and viability.

Kilkenny Local Economic and Community Plan 2016-2021

2.11 The Kilkenny Local Economic and Community Plan will guide policy in the county until 2021. A key function of this plan is to help ensure the effective co-ordination of publicly funded programs and investment in the County until 2021, aligned to the City & County Development Plan

2.12 This plan states that, in 2012, the retail sector was the most important sector in the County in terms of employment, with 760 wholesale and retail businesses employing 23% of the total number of people employed by businesses in the County. Of the wholesale and retail businesses, a large proportion were independent traders, specialist boutiques and fashion stores located in the retail centre of Kilkenny City.

The Kilkenny County Development Plan 2014-2020

2.13 The Kilkenny County Development Plan provides guidance for development in the County from 2014 to 2020. In addition to a range of other retail based objectives, the document identifies four objectives with respect to future retail development:

- To improve the convenience market share retained within the county to 80% post 2020;
- To improve the comparison market share retained within the county to 75% post 2020;
- To increase the convenience trade draw from 8% to 15% post 2020; and
- To maintain the comparison trade draw at 58% post 2020.

2.14 Kilkenny County Council is currently preparing the new Kilkenny County Development Plan which will guide development from 2021-2027, which this Retail Strategy will support.

Settlement Hierarchy

2.15 The brief asks us to outline the level and form of retailing activity appropriate for each tier of the settlement hierarchy. In order to do so, we have provided in this section a review of the adopted settlement hierarchy, the retail hierarchy, and relevant national guidance relating to the appropriate level and form of retail activity within those tiers. For the purpose of this exercise, we have focussed on the listed towns as identified in the brief.

2.16 The Development Plan (2014-2020) sets out the County's settlement hierarchy as provided at Figure 4.1. Figure 2.1 | Kilkenny County Development Plan – County Settlement Hierarchy

Table 3.1 County Settlement Hierarchy	
Type of Urban Centre	Town/Centre
Gateway	Waterford (Ferrybank/Belview in Co. Kilkenny)
Hub	Kilkenny City
Large Town	New Ross (Environs of in Co. Kilkenny)
District Town[30]	Callan, Castlecomer, Graiguenamanagh and Thomastown
Smaller Towns and Villages	Ballyhale, Ballyragget, Bennettsbridge, Clogh-Moneenroe, Dungarvan, Fiddown, Freshford, Glenmore, Goresbridge, Gowran, Inistioge, Johnstown, Kells, Kilmacow, Kilmanagh, Kilmoganny, Knocktopher, Mooncoin, Mullinavat, Paulstown, Piltown, Slieverue, Stoneyford and Urlingford.

Figure 2.2 | Kilkenny County Development Plan – County Retail Hierarchy

Table 4.1: County Retail Hierarchy	
Level/Retail Function	Centre
Level 1 Major Town Centre/County Town	Kilkenny City & Environs
Level 2 District Centre	Ferrybank (part of Waterford environs)
Level 3 District/sub county town	Callan Thomastown Castlecomer Graiguenamanagh
Level 4 Neighbourhood Centre	As designated for Kilkenny City & Environs (Newpark, Loughboy, Loughmacask, Western Environs) and Ferrybank/Belview area in the Environs of Waterford City
Level 5 Small Town/village centre/Rural Area	Various

Local Area Plans

2.17 Kilkenny County Council have prepared a number of Local Area Plans that work in conjunction with the Kilkenny County Development Plan, and provide locally specific guidance to ensure that development builds on the strengths and addresses the weakness of each area.

2.18 The Local Area Plans of relevance to this study include:

- Callan Local Area Plan (adopted May 2019);
- Castlecomer Local Area Plan (adopted May 2018);
- Graiguenamanagh Local Area Plan (currently under review, new LAP to be adopted in 2020);
- Thomastown Local Area Plan (adopted May 2019);
- Ferrybank Belview Local Area Plan (effective January 2018).

National and Regional Retail Trends

COVID-19

2.19 At the time of writing this report the retail climate in Ireland and around the world is dominated by the outbreak of coronavirus (COVID-19). Whilst it is difficult at this stage to determine exactly what the extent of the impacts will be, there is no doubt that the global pandemic will have a considerable impact on Irish and global economies. However, without hard data at the current time, it is impossible to predict exactly what the economic consequences will be.

2.20 The Economic and Social Research Institute (ESRI) reported on 26th March 2020 that the ongoing COVID-19 pandemic is the greatest threat that the Irish economy has faced since the financial crisis[2] of 2008. The government response to the virus, both in Ireland and in other nations around the world has and will continue to result in huge numbers of job losses and a sharp contraction in global economic activity. In their Quarterly Economic Commentary for Spring 2020[3], the ESRI conducted a scenario analysis. They identified that if major restrictions on social and economic life are in place for 12 weeks in total, domestic output would register a recession in 2020, with output contracting by 7.1%. ESRI have also modelled scenarios in which the outcomes are better and worse.

2.21 Our ensuing assessment does not attempt to forecast the impacts that COVID-19 will have on the retail economy of Kilkenny. However, what is clear is that it will be necessary to closely monitor those impacts over the coming months and years and we recommend that the Council undertakes a regular review process (see also our recommendations in Section 5).

Pre-COVID-19 Retail Climate

2.22 The economic climate that prevailed during the 2008 economic recession, had substantial impacts on the retail market in particular reducing disposable income, changing the way people spend and the level of employment within the sector. Consequently, the level of spending contracted and the value of the Irish retail sector fell. A study by Retail Ireland, acknowledges that at least 40,000 jobs in retail were lost during that recession[4].

2.23 Since the 2008 recession, the retail sector has seen slow but sustained growth in retail jobs and sales, though in 2017, the value of retail sales was still 13% below pre-economic crisis levels.

2.24 Ireland has a strong trading relationship with Britain, meaning that the impact of Brexit has also been felt in the Irish retail sector. This is reflected in the weakening of consumer confidence in the second half of 2016, as evident through the reduction in value of retail sales which was down by 0.1%

[2] 'Scenario analysis suggests Irish economy to fall into recession in 2020 as a result of economic deterioration caused by Covid-19', ESRI, 2020
[3] 'Quarterly Economic Review – Spring 2020', ESRI 2020
[4] 'Shaping the Future of Irish Retail 2020', Retail Ireland, 2017

(excluding motor sales and bars) in December 2016 compared with the previous year. Notwithstanding the ongoing uncertainty, the market has steadily improved since the Brexit vote in 2016.

2.25 As of March 2017, the retail sector represented 12% of the country's GDP, and employed 280,000 employees. The continued slow, but steady, growth in this sector can be attributed to changing behaviours and a more value-conscious consumer.[5]

2.26 The report prepared by Retail Ireland found that, in 2017, 50% of retailers believed that the retail sector would contract, whilst 67% of retailers identified Brexit as having a moderate negative impact on business.

2.27 As of early 2019, uncertainty around the global economic climate ensures consumer confidence in Ireland remained cautious.[6] Notwithstanding, and despite the impact of the economic recession and Brexit on the Irish economy, the retail sector was continuing to make a critical contribution to the Irish economy and employment prior to the outbreak of COVID-19.

The Retail Property Market

2.28 In the early stages of the COVID-19 pandemic, it is not yet clear exactly what the outcomes will be in terms of the retail property market. Looking back to how the retail market recovered from the 2008 recession may offer some lessons. As with the retail market, the retail property landscape in Ireland has felt the effects of the 2008 economic recession, Brexit and continued global economic uncertainty. However, the retail property market bounced back from the recession quicker than anticipated, with CBRE reporting that retail property occupancy is healthy and investor appetite continues to grow. Retail is a growing market in Ireland, with 12-14% of national employment coming from the industry, and the average wage being ranked 4th in the EU. However, retail sales growth does not match that of the growth of the economy, and even though most Irish shoppers shop in-store, only 36% of those shoppers consider themselves satisfied with their experience, hinting towards a potential decline in the industry to come, as access to online shopping becomes more readily available.

[5] 'Retail Consumer Report', PwC, March 2018
[6] 'Irish Retail and Consumer Report', PwC, 2019

2.29 Despite recent trends, including uncertainty and the increasing popularity of online and mobile shopping, over two thirds of the Irish population say that they do a mix of online and in-store shopping. This is in combination with positive levels of footfall recorded in 2018. In that year, CBRE reported that retail occupier activity was considerably better than elsewhere in Europe, driven by a combination of a healthy tourism industry and increases in disposable income. [7].

2.30 Notwithstanding the healthy retail occupier market, some firms are reportedly wary of how Brexit will affect them, and some have already made plans to relocate into Europe. For example and according to CBRE, B&Q are planning to pull from Ireland at 'some point in the near future'. B&Q only have eight stores in Ireland at present, but their departure could influence other businesses to do the same.

Trends in Convenience and Comparison Goods Retailing

2.31 The impact of the COVID-19 pandemic has had varying effects on different types of retailers. At the time of writing, necessity grocery and key services are seeing a surge in activity. DIY stores have seemingly benefitted from the situation, with a spike in customers undertaking projects at home.

2.32 Meanwhile, many other retailers are struggling. While there is activity online, discretionary spending generally falls dramatically in difficult times. Online sales are therefore likely to fare better than physical sales, but will still suffer significant losses over this period. Some major high street names including Next, River Island and TK Maxx have even had to close their online operations as a result of growing concerns over social distancing within warehouses. Meanwhile, UK store Debenhams's appointed administrators in April and expect to close all 11 Irish stores.

2.33 As of September 2019, the big supermarket names continued to hold the largest portion of the grocery market share. Dunnes held the largest share at 22.2%, closely followed by SuperValu and Tesco, each with a share of 21.4%. Aldi and Lidl have each continued to record strong growth with a market share of 12.5% and 11.9% respectively[8].

2.34 According to the Retail Times, there is a positive outlook for convenience goods retailing, with 45 new Spar and Eurospar stores scheduled to open in 2019-2020[9].

[7] 'Ireland Real Estate Market Outlook 2019', CBRE, 2019
[8] 'Grocery market Share – Ireland', Kantar World Panel, September 2019
[9] 'Retail Times', Retail Excellence, 2019.

2.35 On trends in the comparison goods market, the recurrent theme prevalent in the advice issued in the media and by specialist reports analysing retail trends, relates to the need for retailers to shift towards prioritising the customer experience. This relates to improving the customer experience of in-store shopping, by providing an environment to showcase the potential of products, thereby improving the experience of the product itself[10], and providing in-store experience. A report by PwC in 2019 found that consumers were willing to pay up to 16% price premium on products and services that offered exceptional experiences, and in addition, that good experiences improve customer loyalty.[11]

Internet Shopping, Mobile Shopping and other Special Forms of Trading

2.36 The COVID-19 pandemic has forced many consumers to change their habits, and this has been only too true for internet shopping. The pandemic will lead to some long-lasting changes in consumer behaviour. Those previously not accustomed to online shopping have, through necessity, shifted to this platform and it is expected therefore that some areas of retail will experience a greater shift into ecommerce than before.

2.37 Trends in online shopping extend to mobile shopping, with smartphone shopping reportedly doubling since 2018[12]. Despite the increase in online and mobile shopping, prior to the COVID-19 outbreak the frequency (daily or weekly) of in-store shopping had also increased since 2018. Mobile shopping was predicted to expand rapidly over the next five years with 30% of consumers purchasing online weekly or more frequently in 2018, up from 24% in 2017.

2.38 The weakened Sterling against the Euro has led to an increase in online retail sales. This, coupled with the ever rising trend towards online shopping, has seen large overseas spend, with almost two thirds of the total online spend by Irish consumers going to overseas retailers[13]. Over 50% of Irish consumers now shop online. This has increased from 19% a decade ago. One of the main contributing factors to the increase in online retail is the convenience it brings at a time when consumers are time poor[14]. €5 billion worth of sales were made online in 2017 and an investigation by PayPal[15], with the online

[10] 'How Does That Make You Feel', Kantar World Panel, September 2018.
[11] 'Irish Retail & Consumer Report', PwC, 2019
[12] 'Retail Consumer Report', PwC, March 2018
[13] 'Irish online consumers now buy more from abroad than from domestic retailers', The Independent, August 2018
[14] IBEC, Irish Retail, Q4 2018 Retail Monitor Report, Feb 2019
[15] 'PayPal Cross-Border Consumer Research 2018', PayPal Inc, 2018

payment facilitator concluding that online spending in Ireland is increasing by around 20% annually and is set to be worth €10 billion in 2020.[16]

2.39 Social media is becoming increasing important in the retail sector, as a principal form of advertising. A report conducted by PwC found that 62% of 25-35 year olds and 92% of 18-24 year olds in Ireland 2018 found purchasing inspiration from social media[17].

2.40 Despite these trends, it is important to highlight that traditional stores remain the most dominant medium for shopping in Ireland, with 73% of consumers shopping in stores at least monthly in 2018.

Trends in Leisure

2.41 Leisure is often considered a discretionary activity and, as such, consumer spending on leisure is greatly influenced by the economic climate and, in particular, average levels of disposable incomes. Leisure uses within this context include visiting restaurants, bars, cafes, arcades, cinemas and leisure centres to a name a few. However, when assessing the average weekly spend of Irish households on 'miscellaneous goods, services and other expenditure', which includes expenditure on holidays, bettings and lotteries, and sports and leisure activities among others, it becomes clear that, even in light of an economic downturn, consumers in Ireland have shown a growing desire to engage in leisure activities. The Central Statistics Office estimates that expenditure in this category has increased from 20.5% in 1980 to 33.6% in 2016[18].

2.42 In 2019 LEON, a chain restaurant based in the UK but with restaurants across Europe as well, announced its plan to open 20 new restaurants in Ireland over the next five years, indicating growth and desire for leisure services in the country.[19]

2.43 In the current Coronavirus lockdown, the leisure sector is one of the worst affected, with some news outlets reporting that bars, restaurants and sports venues could remain closed for a long period with impacts on customer experience after reopening. As with other forms of retail, a best case scenario for the leisure sector would involve a shorter lock down period. The Restaurants Association of Ireland (RAI) has made a submission to the State's public health emergency team proposing that restaurants,

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[16] 'Irish are the biggest international online shoppers in the world', The Irish Times, August 2018

[17] 'Irish Retail &Consumer Report', PwC, 2019

[18] 'Household Budget Survey 2015-2016', CSO Ireland, 2016

[19] 'Retail Times', Retail Excellence, 2019.

cafes and bars open again by following social distancing guidelines under World Health Organisation (WHO) rules for restaurants during the pandemic[20]. This would involve limiting the number of diners to four per 10 sq m.

Local Trends

2.44 In 2018, a number of successive store closures in Kilkenny provoked public debate concerning the future of shopping in the city. Closures included Ryan's XL, Dubray Books, and Lloyds Pharmacy[21] resulting in job losses. The series of shop closures within Kilkenny City has prompted news articles and debate around how to support local businesses to ensure they can succeed despite general retailing uncertainty. The debate is consistent with commentary and discourse at national level. For example, Dr Conor Skehan, DIT points out that retailing has always been subject to change and that the main streets of towns and villages are constantly adapting and evolving as a result. He argues that while it may be claimed that expensive rates and rents, car parking restrictions and public realm are the reason for shop closures, it is more to do with changing values and behaviour of consumers and in particular - online shopping. He concludes that places that accept and plan for change will fare best[22]. In response to the challenges faced by retail owners, Kilkenny County Council has put in place a number of supports including the Small Business Vacant Premises Scheme, and the Local Enterprise Office (LEO) recently delivered a Retail Development Programme to assist retail owners to address the challenge they face in this fast-changing sector. Most recently, the Council has facilitated the establishment of a Kilkenny City Task Force.

2.45 The Local Area Plans prepared to support and guide development in the County provide an assessment of locally specific retail trends. The Callan Local Area Plan (2019) identifies Callan as having experienced an improvement in convenience retailing since 2007, but a decline in comparison floorspace in the same period. Callan reportedly had 522 sq m of vacant retail floorspace, down from 569 sq m in 2007 but up from 440 sq m in 2010.

2.46 The Castlecomer Local Area Plan (2010) recognises Castlecomer's classification as a small town in the retail hierarchy described in the Development Plan. The town's retail activity is generally centred on

[20] 'Proposal for restaurants to open under WHO social distancing guidelines', Irish Times, 2020
[21] Irish Examiner 2018
[22] Sunday Independent, 4th November, 2018

the Square, and is comprised predominantly of basic convenience shopping and lower order comparison shopping.

2.47 The Graiguenamanagh Local Area Plan (2009) provides some insight into retail trends in the area, albeit the information is not recent. In 2007, Graiguenamanagh had experienced a 35% increase in retail floorspace when compared to figures from 2000. However, it was identified that 23.7% of the floorspace in 2007 was vacant, up from 3.3% in 2000. Aldi opened a store in Graiguenamanagh at the end of 2018, with pedestrian connections to Main Street.

2.48 The Thomastown Local Area Plan was adopted in 2019. The LAP identifies that food and food tourism are an important contributor to the local economy. Similarly, there are a number of leisure trails, including a food trail, which supports the local food economy in the area.

2.49 The Ferrybank Belview Local Area Plan (2018) recognises the relationship between nearby Waterford City Centre and Ferrybank. The area is served by a small number of local shops, many of which are within Waterford County Administrative area. The Ferrybank District Centre was constructed in 2009, and houses the library and the Council Area Office, but has not been occupied for retail use. . At present the area is served by a small active commercial area, and one major convenience retailer (Aldi) which is located in the north of the Ferrybank area, some distance from the remainder of the existing retail provision. Two mostly vacant shopping centres at Ferrybank and Ross Abbey present an opportunity to increase the retail offer in the area fairly substantially to support the growing population. The Mr Price store opened at the Ross Abbey shopping centre in 2017, but remains the only active store at present.

Summary and Conclusion

2.50 Whilst at the current time Coronavirus dominates the retail news headlines, key to maintaining a strong economy post-pandemic will be retailer's ability to adapt to changing circumstances. Notwithstanding the increase in sales in some sectors (including grocery stores and supermarkets), COVID-19 is guaranteed to have major implications for most retailers.

2.51 The retail market has experienced significant changes in recent years and the prevailing retail environment continues to be somewhat unstable. In response to this unpredictability, those operating in the market are forced to adapt quickly or otherwise face failing profits.

2.52 Prior to the COVID-19 pandemic, and despite continued global uncertainty, shifting consumer patterns, and the continued rise of internet shopping, the Irish economy and the retail sector remained strong and competitive. In a market disrupted by continued changes in consumer behaviour, investing in the consumer experience is anticipated to be the key to success[23] in securing resiliency in retail stores moving forward. Kilkenny County is seeing the same shifting consumer patterns. Planning policy can play an important role in helping to future proof city, town and village centres against the ongoing uncertainty.

[23] Independent Article, Conor Skehan, 2018

3.0 Baseline Study

Introduction

3.1 The purpose of this section of the report is to provide a quantitative and qualitative analysis of the performance of the six listed towns as identified in the brief within Kilkenny County. This baseline analysis provides an analysis of shopper survey results and should be read in conjunction with the health checks attached at Appendix A.

Methodology

Shopper Survey

3.2 A Shopper Survey was carried out by Ipsos MRBI as part of our engagement work. A copy of the questionnaire is attached at Appendix B. The raw data is also attached at Appendix C.

3.3 The brief asked us to analyse the change that has occurred in retailing in County Kilkenny since the last retail strategy was prepared in 2014. The shopper survey allows us to undertake a qualitative analysis of shopper attitudes and opinions. The survey was purposefully based on a survey carried out in 2010 to support the previous Retail Strategy, in order to allow direct comparison to the previous results. Notably, the 2010 survey was only carried out in Kilkenny City. The additional data Ipsos MRBI has collected for the five other centres is therefore the first of its kind.

3.4 The shopper survey consisted of a range of questions created to gain a comprehensive understanding of attitudes of shoppers to each centre as a destination, including:

- why they choose to go to that centre;
- what they like;
- what they do not like; and
- what potential changes are needed.

3.5 In this section we have compiled the key findings for Kilkenny City, Callan, Thomastown, Graiguenamanagh, Castlecomer and Ferrybank.

3.6 550 surveys were completed across the centres. As Kilkenny City is the main shopping location within the County, 300 surveys were carried out in Kilkenny, at five different locations within the City. For consistency, these locations match up with the interview locations used in 2010. Within the other centres, approximately 50 surveys were carried out in each. Table 4a identifies the interview location breakdown.

Table 4a | Interview Locations

Location	Interviews (#)	Proportion (%)
Kilkenny City	**300**	**52.0**
High Street	80	13.9
Dunnes on Kieran Street	52	9.0
AIB Opposite the Left Bank	51	8.8
Market Cross Shopping Centre	33	5.7
McDonagh Junction Shopping Centre	84	14.6
Ferrybank	**56**	**9.7**
Callan	**58**	**10.1**
Thomastown	**50**	**8.7**
Graiguenamanagh	**55**	**9.5**
Castlecomer	**58**	**10.1**
TOTAL	577	100

Health Checks

3.7 In tandem with the Shopper Survey carried out by Ipsos MRBI, Nexus has also carried out a series of Viability and Vitality Assessments (health checks) for the six centres under prime consideration in this study; Killkenny City, Ferrybank, Callan, Thomastown, Graiguenamanagh and Castlecomer. Health checks are both a physical exercise in walking each centre to understand their make-up and any physical strengths or weaknesses, as well as an exercise in consulting with local stakeholders. To that end, as part of the process of carrying out the health check assessments, Nexus Planning spoke with key stakeholders from each centre. This process allowed us to gain a knowledge and understanding of local issues and opportunities.

3.8 In terms of reporting, the study was led by Annex 2 of the Retail Planning Guidelines 2012 which sets out 12 key indicators for assessing the health of town centres, which we identify below. Annex 2 also provides discussion and guidance around the qualities that can be attributed to a healthy town centre. The four qualities are:

1. Attractions – activities or diversity of shopping opportunities that draw consumers to that centre;
2. Accessibility – accessible within the local catchment by provision of a good road network and public transport facilities, as well as having good local linkages within the centre;
3. Amenity – attractive and enjoyable physical environment, as well as having a distinct identity;
4. Action – to function effectively as a commercially viable centre, development and improvements must be able to take place, and regular cleaning and maintenance should be coordinated.

3.9 These four qualities provide a benchmark for the assessment of the viability and vitality of town centres. Delving further into this assessment, the twelve indicators, as set out in the 2012 Guidelines are:

- Diversity of uses;
- Competitiveness;
- Retailer representations and intentions to change representation
- Shopping rents;
- Proportion of vacant street level property;
- Accessibility;
- Environmental quality;
- Public realm;
- Customer views and behaviour
- Perception of safety and occurrence of crime
- Commercial yields on non-domestic property; and
- Pedestrian flows.

3.10 We report on each of these matters in the complete health checks attached at Appendix A. We provide here a summary of the standout points within each centre. To support the health checks, we have updated the GIS mapping to provide us with a breakdown of the composition and floorspace of each centre. These maps allow us to gain a visual appreciation of the composition of centres, and the ability to see if there are certain 'hot spots' for particular retail activities.

3.11 In our analysis, we utilise a categorisation of town centre uses in line with Experian Goad. Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK and Ireland. Using Experian Goad definitions allows us to be consistent with composition data utilised for the Irish averages. Please refer to the Glossary of Terms at the end of this report for full definitions, but in summary the categories are as follows:

- Convenience goods;
- Comparison goods;
- Retail Services (e.g. dry cleaners, hair salons, beauticians etc.);
- Leisure services (e.g. restaurants, cafes, take-aways etc.);
- Financial and Business Services (e.g. estate agents, banks, post offices etc.); and
- Vacant.

3.12 We also utilise a range of sources of information to build a picture of the rental values achieved in each centre, from sources such as Propertypal.com and other local estate agents.

3.13 Visits were made by Nexus Planning to each centre in order to build a picture of their health in both March and April 2019. On those visits, we conducted a composition assessment of each centre, as well as conducting footfall surveys at a range of destinations. We also undertook an assessment of environmental quality, public realm, perception of safety and considered vacancies.

3.14 The boundaries of the areas surveyed were determined by reviewing each Local Area Plan (LAP) zone map (or equivalent). The town centre area was identified and was generally referred to as retail core, mixed use area or general business area (various titles were utilised across the LAPs).

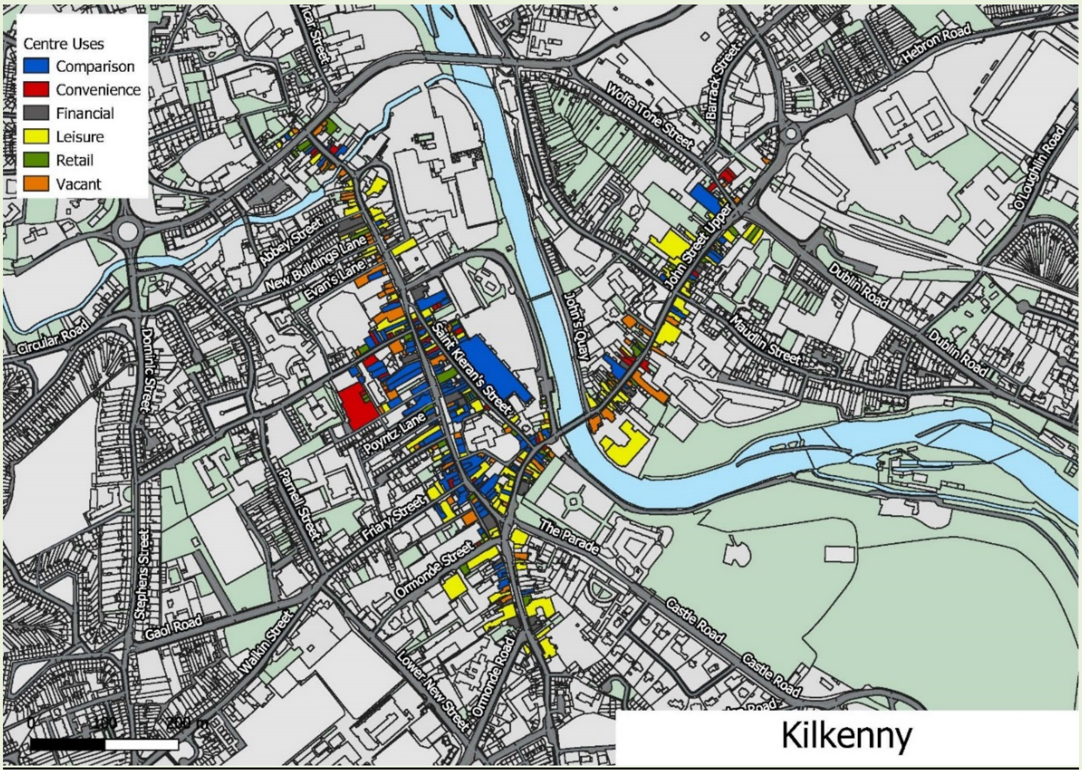
Summary

3.15 Having analysed the Shopper Survey and conducted a range of town centre health checks, we report below on the most relevant findings for each of the six main centres. For further detail, please also refer to the survey results in Appendix C, and the complete health check document attached at Appendix A.

3.16 In each instance below, we begin with an overview of the town centre's offer, a summary of the key points emerging from the health checks, before delving into the data captured in the Shopper Surveys.

Kilkenny City Centre

Kilkenny City Centre Retail Snapshot	
Designation	City Centre – County Town
Population	26,512 (2016 Census)
Number of retail units	450 (within the area surveyed)
Major retailers	Dunnes Stores, Argos, Boots the Chemist, Primark, Carphone warehouse, Three, Vodafone, Goods, Pauls, Allens, Walls



Composition Summary

Kilkenny City Centre	No. of Units	Units %
Convenience	37	8.2
Comparison	138	30.7
Retail Services	55	12.2
Leisure Services	116	25.8
Financial and Business Services	28	6.2
Vacant	76	16.9
TOTAL	**450**	**100**

Viability and Vitality

3.17 Kilkenny is the largest and most dominant centre within Kilkenny County, and this is obvious when visiting the centre. The centre, and retail offer generally is much more significant than any of the district towns in the County, which clearly play a complementary, and secondary role in the retail hierarchy.

3.18 The viability and vitality assessment has shown that Kilkenny City is an attractive centre that provides a wide range of shops and services, servicing the population from within Kilkenny City and more widely Kilkenny County, including visitors and tourists. The complete health check is provided at Appendix A. In order to provide an overview of the assessment of viability and vitality of Kilkenny City Centre, we set out below a response to the four qualities attributed to a healthy town centre as identified in the 2012 Retail Planning Guidelines.

Quality	Discussion
Attraction	The presence of major retailers amongst other attractions including Kilkenny Castle, Cathedral, and specialist and independent shops, attracts visitors from the local area and further afield. This popularity of Kilkenny as a destination, as demonstrated in the shopper survey, is an excellent indication that Kilkenny provides a retail offer that is unrivalled within the County, and is competitive with other retail destinations in the surrounding counties.
Accessibility	Kilkenny is the most accessible of the towns assessed in Kilkenny County, having an important railway link with other parts of Ireland. In addition, there is adequate opportunities for car parking as demonstrated in the Parking Options Assessment prepared by Roadplan Consulting in December 2017. Local buses service the area, including since December 2019 two new City Bus routes. The physical environment is also pedestrian focussed, with Kieran Street having been pedestrianised, and vehicle calming mechanisms in place. Whilst car parking has been identified in the results of the shopper survey as being too expensive, the amount of car parking available was not noted as an obvious issue. Key shopping locations and landmarks are well sign posted.
Amenity	Kilkenny City provides an attractive shopping environment, as noted in responses to the shopper survey. It is therefore important that this strength is utilised to its utmost potential and b..cked by policy. The Medieval Mile is one such example of Kilkenny's historic character being used to advantage. The discovery trail runs through the centre of the city

	linking the 13th Century St Canice's Cathedral and the Anglo-Norman Castle. The historic character of the centre has been protected in recent development which has added to the environmental quality overall.
Action	At the time of assessment, the City was observed as being clean and tidy, indicating that the centre is regularly maintained. In 2019 and 2020, Kilkenny City won an Irish Business Against Litter (IBAL) award. The development of key opportunity sites throughout and on the outskirts of the City Centre will be important catalysts for regeneration, and ongoing change. The recently completed IMC Cinema at Barrack Street opened in April of 2019 and is an example of such development.

Shopper Survey

3.19 Five interview locations were selected within Kilkenny City and 300 interviews were carried out across these locations. The locations were specifically selected to remain consistent and therefore directly comparable to the interview locations from the 2010 survey. The locations included:

- High Street;
- Dunnes on Kieran Street;
- AIB Opposite Left Bank;
- Market Cross Shopping Centre; and
- MacDonagh Junction.

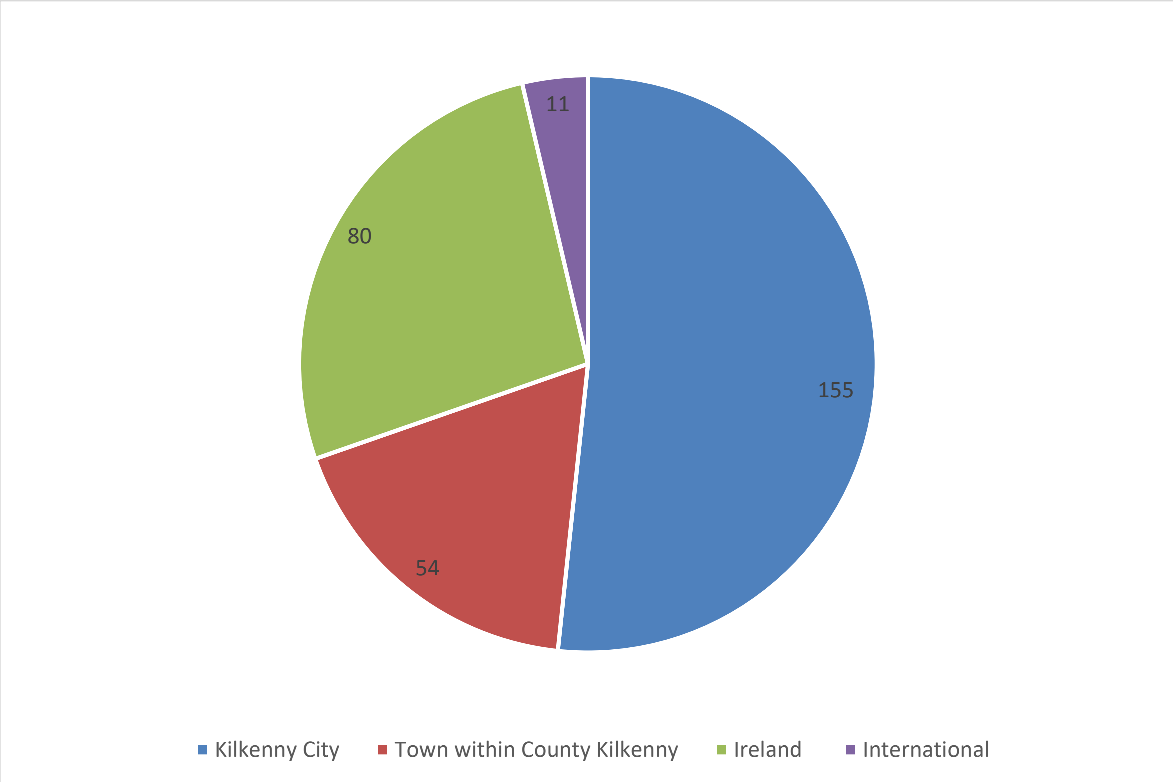
3.20 These locations were also selected to ensure that the whole town centre area was covered and therefore a representative cross section of the shopper population should have been captured.

Shopper Origin

3.21 One of the first substantive questions asked of the respondents what town they lived in or near. This question allows us to understand if the people that come to Kilkenny to do their shopping are from Kilkenny City, from within the County, or if they're from further afield.

3.22 The 2010 shopper survey asked a similar question and concluded that 69% of those interviewed within Kilkenny City were from within Kilkenny County. Similarly, the current survey has identified that 68% of respondents interviewed within Kilkenny City, were from Kilkenny County. We would consider this to be a healthy retention rate of residents from within the County. It also shows that this figure has remained consistent since the survey was last carried out in 2010. In addition, the survey found that at least 21% of respondents were from outside of the County, while 12% had travelled internationally. Figure 4c provides the chart showing the breakdown of the 2019 results including a selection of towns. It shows that of 155 respondents, (51%) were from Kilkenny City, while there were respondents from a range of other towns both within the County, outside of the County and international.

Figure 4c | Kilkenny City – What town/area do you live in/near? (#)



3.23

Mode of Transport

3.24 The 2010 survey analysed how each respondent travelled to Kilkenny City. In 2010, 70% of respondents travelled to Kilkenny City by private car. The 2019 survey results show that this proportion has reduced to 54%, indicating that there has been a modal shift. Happily, there has also been an increase in the proportion of people walking into the City, from 23% in 2010 to 30% in 2019. Travel by bus has also become more popular (6% compared with 2% in 2010), indicating that the bus network and offer has improved since the last survey. It is anticipated that following the introduction of a local bus service in December 2019, increased numbers of visits to the city centre will be facilitated by this new mode of transport and as a result there may be a shift in the trends identified. The other modes of travel have remained reasonably consistent. Table 4d provides a detailed breakdown.

Figure 4d | Travel to Kilkenny City (%)

Mode of Transport	2010 (%)	2019 (%)
Car	70	54
Walk	23	30
Bus	2	6
Bicycle	2	2
Motorbike	0	1
Train	2	4
Tour Coach	0	0
Other	1	2

3.25 The 2019 survey asked shoppers who drove their car into the city, where they parked. The shopper survey found that the most popular locations to park in Kilkenny City amongst the respondents were MacDonagh Junction (33%), Dunnes Store (23%), Market Cross Shopping Centre (9%) and on street (9%). There are also on street car parks that can be utilised for short periods. Respondents were also asked how far they were willing to walk from where they park to the service or shop they planned to visit. The majority of respondents (53%) stated that they were willing to walk for between 5 and 10 minutes from their vehicle.

Frequency of Visits

3.26 Respondents were asked to identify the frequency with which they visit Kilkenny City. The 2010 survey separated respondents into ‘Kilkenny Residents’ and ‘Non-residents’. The results show that Kilkenny residents were much more likely to visit the City Centre frequently, with 91% identifying that they visited at least once a week or more often. For non-residents, 10% of respondents identified they visited at once a week or more. These figures are not surprising and confirm that for residents of the County, Kilkenny City is the go to destination for shopping.

3.27 In the latest survey, the data has not been separated into Kilkenny residents and non-residents, and therefore we consider all respondents together. Of those, 66% identified that they visited the City once a week or more frequently, suggesting that there is still a very healthy level of frequent visits. We consider this to be important, as in the ever changing shopping environment some town centres struggle to retain frequent visitors and good footfall, in the context of growth in internet shopping (as discussed in section 2). Based on the figures extrapolated through the shopper survey and the high level of footfall observed in Kilkenny during health check site visits, we consider that Kilkenny City has a healthy level of visitors.

Main Reason for Visiting

3.28 Following suit of the 2010 survey, respondents were asked about their main purpose for visiting Kilkenny City. In the 2010 survey, respondents could give as many responses as they liked and therefore the percentages do not add up to 100. The responses mentioned the most often were:

1. Clothes / footwear (79%);
2. Browse (64%);
3. Eating / meal out / snack (47%);
4. Main grocery shopping (36%); and
5. Tourist / day trip (35%).

3.29 The traditional role of a town centre has historically been for shopping for clothing and footwear and other items, and the 2010 survey results support that theory. What we have done slightly differently in the 2019 data set, is to identify priorities. The 2019 data is separated into a) the main reason the shopper had for visiting, and b) any other reason. Notably, the response "On business/work" received a total of 20% in 2010, compared with 18% in the 2019 survey. Table 4e provides a breakdown of the most popular main reason, and the most frequently mentioned secondary reasons.

Table 4e | Reasons for Visiting the Centre

	Main Reason	Secondary Reasons*
1	Work (18%)	Browse (25%)
2	Clothing / footwear (17%)	Eating / meal out / snack (22%)
3	Meet friends / family (13%)	Nothing in particular (20%)
4	Main or other groceries (12%)	Clothing / footwear (18%)
5	Browse (10%)	Main or other groceries (14%)

* Respondents could select more than one answer and therefore percentage does not add up to 100%

3.30 Importantly, the results show that shopping for clothing and footwear is still one of the most important draws into the town centre, with 17% identifying that it was their main reason for visiting Kilkenny. It was also regularly noted as a secondary reason for visiting, along with a high proportion of respondents noting that they like to 'browse'. Meeting with friends and family was the main reason for visiting Kilkenny for 13% of respondents, and we note that this was not a popular response in the 2010 survey. We consider this to be an important indication that Kilkenny a destination for people to socialise and utilise leisure services such as restaurants, bars, cafes and other leisure services, rather than just the more traditional shopping focus. Indeed, the composition data shows that just over 25% of units in Kilkenny City are leisure services. The national average according to Experian Goad for leisure services within town centres is 22.7%.

Qualitative Review

3.31 One of the most important parts of the shopper survey are the qualitative questions that provide us with data regarding what people like and do not like about Kilkenny City. To that end, respondents were asked what they thought the main attraction of the City is, and what principle improvements would make them visit more often. For clarity, the "main reason" is the purpose of the trip, whereas "main attraction" delves into why the respondent decided to travel to Kilkenny to carry out their visit, over another town.

3.32 The comparison of responses at Table 4f shows that for the most part the main attractions and principle improvements have remained fairly similar over the 9 year period. The main attraction in both 2010 and 2019 was that the centre is close to home. This indicates that the primary market for shoppers is those who live nearby, for which travelling to Kilkenny City is convenient. There has been an interesting swing from 'good choice of clothing and footwear' to good choice of places to eat and drink' as the next most popular attraction. This is reflective of the shift that we are seeing across Europe, of town centres transitioning from being places that are primarily for shopping, to places that are also for other activities such as eating and drinking. The third main attraction in both 2010 and 2019 was that Kilkenny offers an attractive shopping environment. It is therefore clearly important to those who visit Kilkenny that the character and urban environment remains attractive, as this is a key draw for visitors.

3.33 Turning now to principle improvements, the main focus in both 2010 and 2019 results was around provision of cheaper and free car parking. This is a response that is seen in most large town centre surveys, and is not necessarily reflective of the level of provision of car parking. Interestingly, while 'more parking provision' was identified as the second most popular principle improvement in 2010, it was only identified by 3% of respondents in 2019, indicating that over the period between surveys there may have been an improvement in the amount of car parking that is available, and that there has been a modal shift and walking is now a more popular option. The 2019 survey has shown that shoppers want improvements through 'more shops' and 'fewer empty shops'. The vacancy rate for Kilkenny is 16.9% of units, which, although not too dissimilar to the Irish average of 15.3%, represents a fairly high proportion of the overall units within Kilkenny City Centre. Local residents and shoppers have obviously noticed this level of vacancy.

Table 4f | Main Attraction and Principle Improvement

	Main attraction		**Principle improvement***	
	2010	**2019**	**2010**	**2019**
1	Close to home (23%)	Close to home (22%)	Cheaper / free parking (15%)	Cheaper / free parking (17%)
2	Good choice of clothing and footwear (10%)	Good choices of places to eat and drink (13%)	More parking provision (10%)	More shops (9%)
3	Attractive shopping environment (10%)	Attractive shopping environment (10%)	More pedestrianised streets (7%)	Fewer empty shops (8%)

*Not including the response 'don't know'

Opportunity Sites

3.34 Kilkenny City, as the largest centre within the County, has a number of opportunity sites for town centre development. As was discussed in Chapter 2 of this report, town centres are increasingly needing to diversify to respond to the changing nature of retail. Town centre development should therefore not be limited to traditional retailing. A diversity of uses including residential should be promoted. While opportunity sites are limited in the core retail area, there are a number located in the peripheries of the main part of the city. We note that the 2005 Local Area Plan identified a series of specific sites and appropriate land uses for the future development of those sites. A number of the sites identified have come forward and development has either been completed or has commenced. Any development proposed on those opportunity sites should not be at the commercial expense of the existing convenience and comparison uses within the City. Proposed alternative uses should be complementary of the existing offer, and only supported if there is a demonstrated need. Complementary uses are uses that do not directly compete against each other.

3.35 Construction within the Abbey Quarter recently commenced on the 10-acre Smithwick's Brewery Site on the banks of the River Nore, in the centre of Kilkenny. The first phase of development consists of the Brewhouse being redeveloped to provide a Grade A office development. An adopted masterplan has proposed capacity for almost 60,000 sq m (645,000 sq ft) of mixed use, residential, commercial, retail, education and civic space on this site. Stage 1 of the development has commenced. The former Mayfair Building has been given Part 8 consent and its conversion to a new city library will commence in 2020. The proposed mix of uses is consistent with the general expectation that town centre uses should not be limited to traditional retail uses, and that footfall generating uses should be prioritised wherever possible.

3.36 In the 2008-2014 Development Plan the former Kilkenny Mart site was identified as providing the basis for the second phase expansion of the city centre. The location was deemed appropriate to accommodate a sustainable mix of uses, including retailing, residential, offices, community and cultural facilities. Since that time the Smithwick's Brewery Site emerged for redevelopment. A new cinema complex has recently opened on this site, although no further applications are currently pending.

3.37 Wolfe Tone Street car park and John's Green are currently operating as surface level car parking, and present opportunities for development. Both of these sites are located in the north east part of the City, and may present an opportunity for mixed use development. Any such development would need to replace public car parking opportunities, and provide urban realm improvements. We also note that there is an opportunity in this area to consider linking in with the recently opened IMC Kilkenny, at Barrack Street, to create a leisure precinct.

3.38 There is also a remaining opportunity site as part of the MacDonagh Junction shopping centre which has not yet come forward for further development.

3.39 Kilkenny City also offers opportunities to create vibrant laneways. Improvements to laneways can help to provide improved walkability and connectivity, a canvas for public art, and new public spaces. Laneway projects have been implemented in cities throughout the world, with varying levels of success. Where well managed, vibrant laneways can be a tourist attraction in their own right.

Stakeholder Consultation

3.40 Two stakeholder sessions were held in Kilkenny City during the preparation of the Strategy, which afforded the opportunity for retailers and business owners to provide feedback on the key issues facing their businesses. Attendees were also given the opportunity to submit written representations. Twelve submissions were received during the consultation period, which raised a range of issues and opportunities. Some of the key points raised are outlined below, although it should be acknowledged that this is not an exhaustive list of the comments that were received.

a. The high proportion of vacant units within the City Centre;
b. The inadequate supply of car parking for business owners and visitors to the City;
c. The high cost of car parking;
d. The need to protect the historic environment and the character of the City, whilst also encouraging a commercially successful City Centre
e. The opportunity to take further advantage of the tourism industry through supporting local events and partnering with important tourism facilities already operating in the City including the Kilkenny Castle;
f. The suggestion that hiring a Town Centre Manager to identify issues and find solutions may assist with the overall function and success of Kilkenny City Centre.

3.41 While some of the issues raised were out of the scope of a Retail Strategy, many of the ideas have been considered, and included as either Kilkenny Specific recommendations, or within the objectives and policies included at Chapter 5.

Kilkenny Specific Recommendations

3.42 Kilkenny City has the largest retail offer of any of the listed towns, and continues to exert its dominance as a shopping destination within the County and in the south east. The shopper survey identified that the City was the most popular location in the County for shopping. To this end, it is important that future retail policies are designed to protect its dominance and support its continued growth.

3.43 The main feedback received from shoppers in Kilkenny in terms of how they would like to see the City improved, related to the price of car parking, provision of additional shops, and filling vacant units. Based on the shopper survey results and our review and assessment of the function of the city centre, we have provided a series of recommendations relating to the future of retail and leisure in Kilkenny.

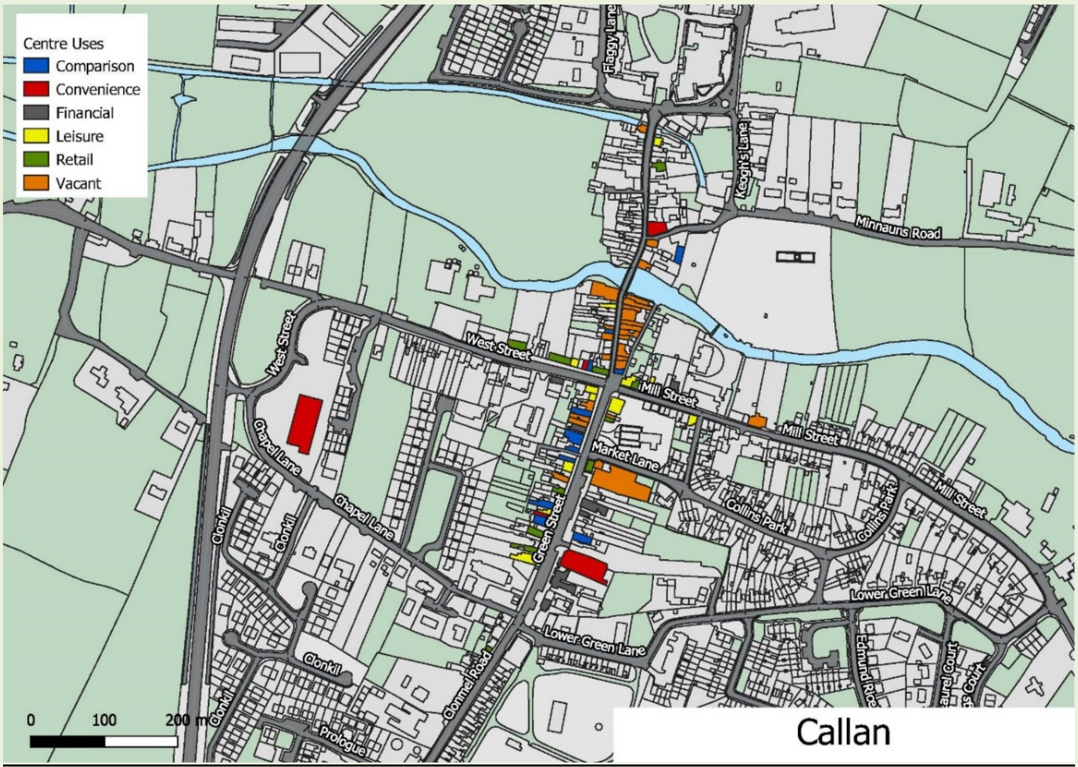
- Host and promote local events that advertise what the city has to offer, and work with public relations to ensure that the Kilkenny image is appropriately publicised and continuing to improve public perception;
- Prepare a marketing and tourism strategy for Kilkenny City Centre to ensure that public perception remains positive, and that tourism opportunities are exploited and maximised, in particular in respect of the Medieval Mile. Key to this strategy would be taking advantage of the link between retailing and tourism. Continue to market Kilkenny City as the destination of choice with a strong cultural focus, that is, a great place to shop, work, be entertained and visit, in order to attract local residents, and visitors from further afield. Similar work has already been undertaken by the Chamber of Commerce including the Christmas 2018 'Shop Local' campaign and the 2019 #shopkilkenny campaign;
- Work in conjunction with the Kilkenny Castle to host events, with a particular focus on family-friendly events;
- Consider how opportunity sites could be brought forward for development, and where considered appropriate, prepare a Masterplan for the development of those sites. Development of one such development site, the Abbey Quarter, has commenced for Phase 1 and the application for Phase 2 is currently being prepared;
- Continue to support the City Centre Taskforce in its capacity to create a platform for change.
- Explore whether employing a Town Centre Manager would be of benefit for the future management of centre related issues. Consider what the role of the Town Centre Manager would be – for example public relations, city centre marketing and publicity, identifying issues and finding solutions;

- Work with artist groups or local education establishments on mini programmes throughout the city. For example, one such programme could be to provide design solutions for promoting the City's laneways as creative or historic spaces;
- Work with Applicants and developers to improve lighting at night in parts of the centre that are identified as being dangerous;
- Investigate opportunities for a regular 'Late Night Shopping' evening, whereby on one evening each week, fortnight or month, shops within the city centre stay open later in the evening to promote retailing opportunities. At present, some retailers participate in late night shopping on a Thursday night or Friday night, however formalising and marketing the event would assist in promoting its existence and success.

Callan District Centre

Health Check Overview

Callan District Centre Retail Snapshot	
Designation	District Centre
Population	2,475 (2016 Census)
Number of retail units	73
Major retailers	Supervalu and Aldi



Composition Summary

	No. of Units	Units %
Convenience	5	6.9
Comparison	11	15.1
Retail Services	11	15.1
Leisure Services	12	16.4
Financial and Business Services	7	9.6
Vacant	27	37.0
TOTAL	**72**	**100**

Viability and Vitality

3.44 Callan is a district centre located in the western part of Kilkenny County. The centre consists of 72 retail units. The core town centre is focussed around the cross roads where Green Street (the main shopping street) meets West Street, Mill Street and Upper Bridge Street.

3.45 The viability and vitality assessment has shown that Callan is a small centre that provides a range of shops and services local in nature. The shops generally service local residents from Callan and the surrounding area and the centre provides a pleasant, albeit small, shopping offer. The complete health check is provided at Appendix A. We have provided below an assessment against the four qualities that can be attributed to a healthy town centre as identified in the 2012 Retail Planning Guidelines.

Quality	Discussion
Attraction	Based on the shopper survey results and observations made at the time of assessment, the main attractors from a retail perspective are the SuperValu, and Aldi stores which are clearly the most popular shops within the centre. The attraction of Callan town centre to residents is its convenience, and the majority of people who were surveyed noted that the centre is close to their home or work.
Accessibility	The centre is small enough that it is easy to walk from one end to the other in a short period of time. The Town Centre is easily accessible by car from the N76 running from Clonmel towards Kilkenny City Centre. Parking is plentiful throughout the centre, and respondents to the survey noted that parking was free. Callan is served by a bus service, the 717, which runs every 2 hours between Clonmel and Dublin Airport via Kilkenny. For a smaller, local centre, it is considered that the centre is fairly well accessible.
Amenity	The quality of the built environment and public realm in Callan ranged. The main shopping street, Green Street, is a relatively active, vibrant and pleasant area in Callan extending from SuperValu to the crossroads. The retail units are colourful and the majority of units have attractive shop frontages, providing a sense of local character. Further away from the main street, higher levels of vacancies make for a quieter shopping environment.
Action	The centre was generally observed to be neat and tidy, particularly along Green Street, and appeared to be well maintained. There are a number of sites around the centre that have been identified as potential opportunity sites, the development of which would provide regeneration opportunities.

Shopper Survey

3.46 The shopper survey that was conducted in 2010 interviewed people within Kilkenny City. The shopper survey did not interview shoppers in the other smaller towns, and therefore we are unable to provide a comparison of attitudes for Callan. Notwithstanding, we have provided an analysis of the results of the shopper survey for Callan in the following section.

Shopper Origin

3.47 Within Kilkenny County, the shopper survey has shown that people are most likely to travel the furthest to go to Kilkenny City. Within the smaller centres it was far more common for the respondents to live in or near the centre they were interviewed in. For example, of the 58 people interviewed in Callan, 52 people, or 90% lived in or near Callan.

Mode of Transport

3.48 The shopper survey has identified that in Callan, 67% of respondents travelled by private car, whilst 31% walked. The breakdown is shown in Figure 4g. As would be expected, no respondents identified that they arrived by public transport, as there is limited provision of local services in this area. Only 2% of respondents identified that they travelled in any other way than car or on foot, and that was by motorcycle. The fairly high proportion of people walking into the town centre is an indication that generally speaking Callan caters for local residents rather than visitors from further afield.

Figure 4g | Travel to Callan (%)

Mode of Transport	Callan 2019 (%)
Car	67
Walk	31
Bus	0
Bicycle	0
Motorbike	2
Train	0
Tour Coach	0
Other	0

3.49 The survey also asked respondents about how the availability of parking influences their desire to shop in those locations. In Callan 59% identified that parking influences their desire to shop in Callan either to a large extent, or to some extent, while 33% identified that it influences their desire not that much or not at all.

Frequency of Visits

3.50 Respondents were asked to identify the frequency with which they visit the centre. Table 4h provides a breakdown of how often the Callan survey respondents visited Callan. The survey data shows that 53% of respondents identified that they travelled to Callan more than 3 times a week. This figure is higher than for the corresponding figure for Kilkenny City (46%), indicating that local residents of Callan are more likely to stop in more frequently. This is likely to be as a result of Callan being a convenience focussed centre, very much local in nature. The two main convenience stores of Aldi and Supervalu, for example, are two of the most popular stores within the centre, although it is noted that the Aldi is located at very much the outskirts of the core retail area.

Figure 4h | Frequency of Visits (%)

Frequency of Visits	Callan 2019 (%)
More than 3 times a week	53
2--3 times a week	21
Once a week	10
Less often	2
2--3 times a month	2
Once every 2 months	0
Once a month	5
First time	0
Work here	7
Total	100

Main Reason for Visiting

3.51 The survey asked the respondent what the main reason for visiting Callan was, and then if there were any other reasons to visit. Each respondent was able to identify one main reason, and the results have shown that the most common response was 'other grocery shop'. This is likely a result of the popular Supervalu in town, a convenience shopping unit that is both used for top up shopping and main food shopping as evidenced by the third most popular reason for visiting being to undertake the 'main weekly grocery shop'. In addition, the relatively new Aldi store located at edge of the core retail area in Callan has increased the offer of convenience goods shops within the Callan. The top five reasons for visiting Callan are rounded out by 'work' (17%), 'bank / financial services' (12%), and 'other' (4%).

3.52 Of the secondary reasons for visiting, respondents were able to provide as many as they liked. The most common answer was 'nothing in particular', which is an indication that unlike a centre such as Kilkenny City, visitors were more likely to have a specific reason to stop in Callan, and were less likely to link their trip with another activity. When respondents did provide secondary reasons for visiting, the most popular choices were 'grocery shopping', which correlates with the convenient nature of the Supervalu in town and Aldi to the east of the core retail area, 'eating / meal out / snack' (7%), and 'toiletries / chemist' (7%).

Table 4i | Reasons for Visiting the Centre

	Main Reason	Secondary Reasons*
1	Other grocery shop (28%)	Nothing in particular (50%)
2	Work (17%)	Other grocery shopping (25%)
3	Main weekly grocery shop (12%)	Eating / meal out / snack (7%)
4	Bank / financial services (12%)	Toiletries / chemist (7%)
5	Other (4%)	Post office (4%)

* Respondents could select more than one answer and therefore percentage does not add up to 100%

Qualitative Review

3.53 Turning now to our qualitative factors, respondents were asked what they thought the main attraction of Callan is, and what principle improvements would make them visit more often. The main attraction that was identified by respondents was that the centre is close to their home. The next most popular responses were that parking is free and available, and furthermore, that it is close to where they work.

These further responses are evidence to the fact that Callan is primarily a town centre utilised by residents local to the area, and is focussed around being a convenient location to drop into.

3.54 When asked about what principle improvements they would like to see, most responses focussed around the shopping aspect of the centre. The most popular response was 'more shops', 'fewer empty shops', and 'more designer shops'. This indicates perhaps that some residents are not satisfied with the current provision of shops within the centre.

Table 4j | Main Attractions and Principle Improvements

	Main Attraction*	Principle Improvement*
1	Close to home (33%)	More shops (26%)
2	Free parking (10%)	Fewer empty shops (9%)
3	Close to work (7%)	More designer shops/boutiques (5%)

*Not including the response 'don't know'

Opportunity Sites

3.55 At the time of assessment, one opportunity site was easily identified in Callan. The site is located at the corner of Green Street and Newmarket Lane, behind Café L'Arche, which fronts Green Street. The site, the Callan Co-op, which is reasonably large and comprises disused buildings, presents an opportunity for development. If a high quality development can be brought forward at this location, this may act as a catalyst for regeneration in other parts of the town.

Town Specific Recommendations

3.56 Callan is a pleasant centre offering a range of shops and services local in nature. The centre is anchored by a SuperValu that appears to be one of the more popular units along Green Street. An Aldi is located on the edge of the town. The results of the shopper survey identified that in terms of improvements, shoppers in Callan overwhelmingly desired more shops in the town. This indicates that further diversity in the retail offer in Callan would be welcomed.

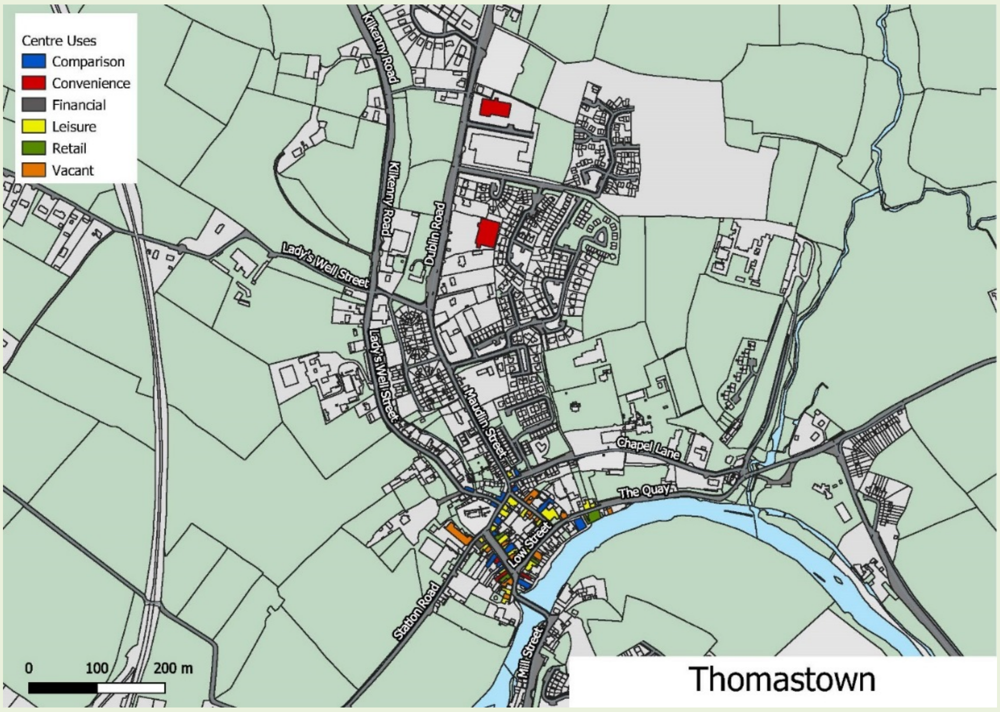
3.57 The Council have recently secured funding for the town through the Rural Regeneration and Development Fund. In order to ensure the future longevity of the town and based on our review of responses to the shopper survey, recommendations are outlined below. Common recommendations across each of the towns are included in the conclusions of this chapter.

- Develop a strategy to manage the series of vacant units along Upper Bridge Street. While this is further discussed in section 4 of this report, the majority of units on Upper Bridge Street, south of the river, are vacant. A Strategy could be devised that attempts to rejuvenate this part of the town, or, the area could be transitioned away from retail development over time and the old shops converted to residential uses. Alternatively if there is no demand for residential uses, then uses that support but do not compete with the main town centre uses should be considered, such as health, education, leisure services and business.

Thomastown

Health Check Overview

Thomastown District Town Retail Snapshot	
Designation	District Town
Population	2,445 (2016 Census)
Number of retail units	64
Major retailers	SuperValu and Lidl (located out of centre)



Composition Summary

	No. of Units	Units %
Convenience*	4	6.3
Comparison	15	23.4
Retail Services	4	6.3
Leisure Services	22	34.4
Financial and Business Services	2	3.1
Vacant	17	26.6
TOTAL	**64**	**100**

*SuperValu and Lidl located out of centre and therefore shown for information purposes only

Viability and Vitality

3.58 Thomastown is a district town located south of Kilkenny City. The centre consists of 64 retail units. The main commercial area of Thomastown is predominantly found along Market Street, Pipe Street, Logan Street and Low Street, which is set out in a square formation. There are also a number of stores to the north of the main core retail area, along Dublin Road. The River Nore passes the southern edge of the centre and provides an attractive outlook. SuperValu and Lidl are both located to the north of the town, outside of the core retail area.

3.59 The viability and vitality assessment has shown that Thomastown is a small centre providing a range of shops and services that are particularly local in nature. The shops generally service local residents from around Thomastown rather than from further afield. The complete health check is provided at Appendix A. In order to provide an overview of the assessment of viability and vitality of Thomastown, we have provided below a response to the four qualities identified in the 2012 Retail Planning Guidelines that can be attributed to a healthy town centre.

Quality	Discussion
Attraction	The main attraction of Thomastown does not appear to be any one shop or services, or physical element of the town. Rather, the attraction of Thomastown to shoppers is that it is convenient. For the most part this relates to it being a destination for people who live nearby, and who drive into the centre to undertake basic activities like convenience shopping or banking. The main convenience units serving the centre are located at the edge and north of the town.
Accessibility	The Centre is accessible by road via the R448 (Naas to Waterford) and R700 (Kilkenny to New Ross). Traffic travels through the town on a one-way system, in a square formation along Market Street, Pipe Street, Logan Street and Low Street. Car parking is available in the form of on-street parking and car parks are found at Marshes Street/Station Road and the Quay Car Park on the north-eastern outskirts of the centre. Thomastown does have a train station, however this is located outside the centre. Train services run between Waterford and Dublin. As a result, Thomastown is considered to be very accessible for those accessing it by car or as a pedestrian, and as reflected in the survey results.
Amenity	The environmental quality is largely pleasant throughout Thomastown, with readily available street furniture. In particular, the main shopping street of Market Street was observed to be of attractive local character. In

	addition the river creates an attractive outlook to the south west of the town and provides an enjoyable setting.
Action	The town generally appears to be well-kept with no visible litter or graffiti at the time of the site visit. There are a number of sites around the centre that have been identified as potential opportunity sites, the development of which would provide regeneration opportunities and could offer the opportunity to be a catalyst for further development.

Shopper Survey

3.60 The 2010 shopper survey did not interview shoppers in Thomastown, and therefore we are unable to provide a comparison of data and attitudes from 2010 as we were for Kilkenny City. Notwithstanding, we have provided an analysis of the results of the 2019 shopper survey for Thomastown using a range of key topics.

Shopper Origin

3.61 Within smaller centres in the county it has been found that generally speaking it was common for the respondents to live in or near the centre they were interviewed in. In Thomastown, 35 of the 50 people surveyed were from Thomastown. Other respondents identified that they were from Kilkenny City, Callan, Waterford, Graiguenamanagh and Gowran.

Mode of Transport

3.62 The shopper survey has identified that in Thomastown, 74% of respondents travelled by private car, whilst 22% walked. The breakdown is shown in Figure 4k. Only 2% of respondents identified that they travelled in any other way than car or on foot, and that was by bus. The number of people travelling to the town by car was higher than both Kilkenny and Callan, and conversely, the proportion of people walking was also lower. This seems to indicate that people visiting Thomastown are more reliant on their cars than in other parts of the County.

Figure 4k | Travel to Thomastown (%)

Mode of Transport	Thomastown 2019 (%)
Car	74
Walk	22
Bus	2
Bicycle	0
Motorbike	0
Train	0
Tour Coach	0
Other	0

Frequency of Visits

3.63 Respondents were asked to identify the frequency with which they visit the centre. Table 4h provides a breakdown for Thomastown. The survey data shows that 78% of respondents identified that they travelled to Thomastown at least once a week or more frequently. 10% of respondents also identified that they worked in Thomastown.

Figure 4i | Frequency of Visits (%)

Frequency of Visits	Callan 2019 (%)
More than 3 times a week	44
2--3 times a week	12
Once a week	22
Less often	6
2--3 times a month	2
Once every 2 months	2
Once a month	0
First time	2
Work here	10
Total	100

Main Reason for Visiting

3.64 The survey asked respondents about their main reason for visiting Thomastown. Each respondent was able to identify one main reason, and the results have shown that the most common responses were 'work' and 'groceries'. In this instance, the categories of 'main weekly grocery shop' and 'other grocery shop' have been combined. In combination with the remaining three most popular main reasons for visiting Thomastown, a picture of employment and convenience is painted as the main reasons for people to visit the town.

3.65 Of the secondary reasons for visiting, respondents were able to provide as many as they liked. The most common response was 'nothing in particular', which is an indication that visitors were less likely to link their trip with another activity. 'Other grocery shopping' was the next most popular, further contributing to the convenient and practical function of the centre.

Table 4m | Reasons for Visiting the Centre

	Main Reason	Secondary Reasons*
1	Work (16%)	Nothing in particular (53%)
2	Main weekly grocery shop / other grocery shop (16%)	Other grocery shopping (23%)
3	Other (14%)	Eating / meal out / snacks (9%)
4	Bank / financial services (10%)	Browse (6%)
5	Toiletries / chemist (10%)	Meet friends / family (4%)

* Respondents could select more than one answer and therefore percentage does not add up to 100%

Qualitative Review

3.66 Turning now to our qualitative factors, respondents were asked what they thought the main attraction of Thomastown is, and what principle improvements would make them visit more often. The main attraction that was identified by respondents was that the centre is close to their home. The next most popular responses were that parking is free and that Thomastown is easy to get to by car. These responses once again focus around convenience rather than that there is any particular physical attraction or particular shop or service located in Thomastown.

3.67 When asked about what principal improvements they would like to see, the most popular responses were 'more shops' and 'more designer shops'. These responses indicate that residents would like to see a wider range of shops and services than are currently offered, and that up-market stores would be enjoyed by some members of the local population. The third principal improvement was 'more parking provision', which coupled with the high proportion of people that travelled to the town by car, makes sense.

Table 4n | Main Attractions and Principle Improvements

	Main Attraction*	Principle Improvement*
1	Close to home (30%)	More shops (18%)
2	Free parking (12%)	More designer shops (10%)
3	Easy to get to by car (6%)	More parking provision (10%)

*Not including the response 'don't know'

Opportunity Sites

3.68 A potential development opportunity site at Station Road, south west of the Saint Mary's church building was identified at the time of assessment. The existing building (former SuperValu) is currently vacant and therefore presents development prospects. The site is large enough to warrant a reasonable sized town centre development and is in a location that benefits from proximity to the core retail area of Thomastown.

Town Specific Recommendations

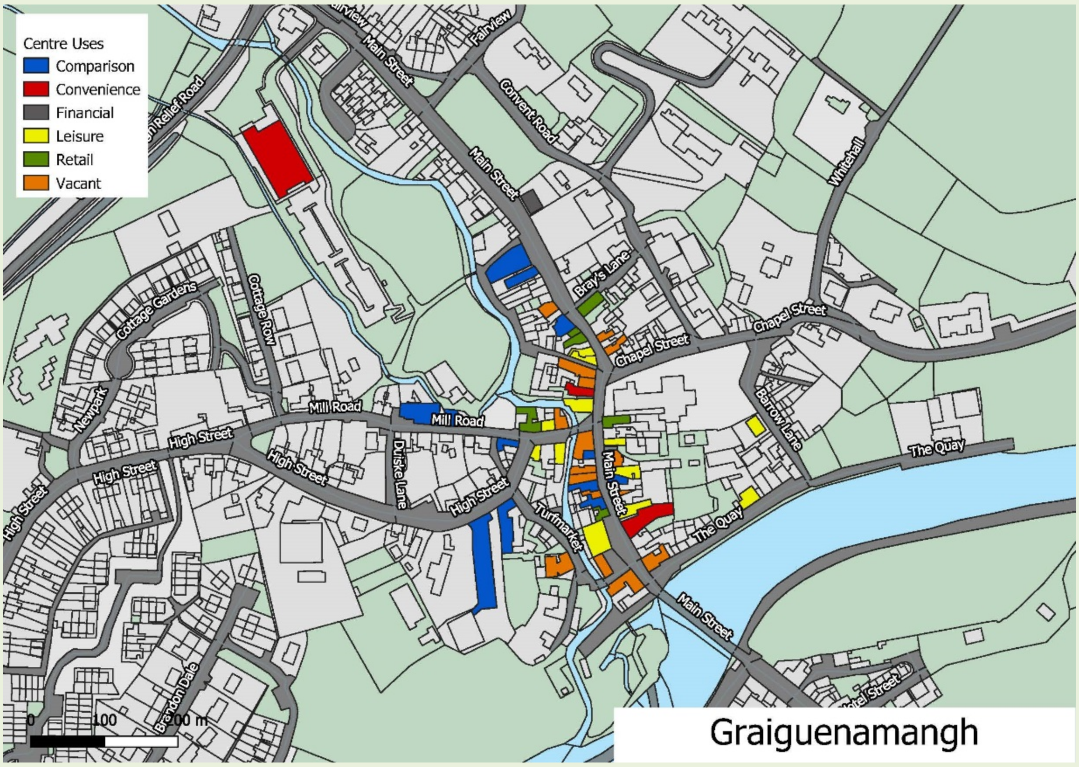
3.69 The shopper survey identified that the principal improvement that local shoppers desired related to provision of additional shopping opportunities, and also identified a desire for more designer shops. Based on our review of the vitality and viability of Thomastown, we have prepared a series of recommendations for the future. Common recommendations across each of the towns are included in the conclusions of this chapter.

- Consider opportunities to prepare a tourism strategy, particularly in relation to taking advantage of the River Nore;
- Explore opportunities to increase the amount of comparison goods floorspace within the town, and approach owners of vacant units to fill vacancies and improve the vibrancy.

Graiguenamanagh

Health Check Overview

Graiguenamanagh District Town Retail Snapshot	
Designation	District Town
Population	1,475 (2016 Census)
Number of retail units	49
Major retailers	SuperValu and Aldi



Composition Summary

	No. of Units	Units %
Convenience	3	6.1
Comparison	11	22.4
Retail Services	6	12.2
Leisure Services	12	24.5
Financial and Business Services	1	2.0
Vacant	16	32.7
TOTAL	**49**	**100**

Viability and Vitality

3.70 Graiguenamanagh is the smallest of the four district centres within the County by number of units and is located 33 kilometres south east of Kilkenny City. The centre consists of 49 retail units, 16 of which were observed to be vacant at the time of assessment. The commercial area of Graiguenamanagh is predominantly found along Main Street. The River Barrow passes the southern edge of the centre and forms the County Carlow border and is an important and attractive feature of the town.

3.71 The viability and vitality assessment has shown that Graiguenamanagh is a small centre that suffers from a high proportion of vacant units, but has been identified as having a lot of potential through development of key opportunity sites. The shops are understood to generally service residents from the local area, and its role within the wider retail hierarchy is for local convenience. The complete health check is provided at Appendix A. In order to provide an overview of the assessment of viability and vitality of Graiguenamanagh, we provide below a response to the four qualities that can be attributed to a healthy town centre as identified in the 2012 Retail Planning Guidelines.

Quality	Discussion
Attraction	Graiguenamanagh is particularly popular to local residents who can walk into the town centre, more so than most of the other centres in Kilkenny County. Furthermore, whilst there is very obviously an issue regarding the high proportion of vacancies in the centre, shoppers appear to be attracted to the town for its convenience goods offer, its safe environment, and its setting beside the River Barrow.
Accessibility	The centre is accessible by road via R703 (Graiguenamanagh to Thomastown) and R705 (Carlow to New Ross) which converge to the north of the town at the top of Upper Main Street. Car parking is available in the form of on-street parking. The town is served by bus service 881 which runs twice daily between Graiguenamanagh and Kilkenny Castle and there is no train station. Within the town itself, the centre is small, and easily walkable, and therefore the town is considered to be well accessible for those arriving by vehicle or on foot.
Amenity	Graiguenamanagh is particularly interesting as it provides a pleasant environment, but is also very clearly struggling, with numerous buildings that are derelict and a high proportion of vacancies. Notwithstanding, there some attractive parts of the town, and local character is evident. Public art is located throughout the centre with life-size statues of

	Cistercian Monks found in several locations and large murals to be found by the river. There is a clear opportunity to continue to promote the town as a tourist destination.
Action	The centre was generally observed to be well-kept and there was limited graffiti visible at the time of the site visit. There are a number of derelict sites around the centre that have been identified as potential opportunity sites. We consider that if one or two of these sites were developed, further regeneration opportunities may emerge.

Shopper Survey

3.72 The 2010 shopper survey did not interview shoppers in Graiguenamanagh, and therefore we are unable to provide a comparison of data and attitudes from 2010 as we were for Kilkenny City. Notwithstanding, we have provided an analysis of the results of the 2019 shopper survey for Graiguenamanagh using a range of key topics.

Shopper Origin

3.73 Within smaller centres in the county it has been found that generally speaking it was common for the respondents to live in or near the centre they were interviewed in. In Graiguenamanagh, 42 of the 55 people surveyed were from Graiguenamanagh. The remainder of the respondents were from a range of locations within and outside the County.

Mode of Transport

3.74 The shopper survey has identified that in Graiguenamanagh, 60% of respondents travelled by private car, whilst 38% walked. The breakdown is shown in Figure 4o. This proportion of respondents who walked into town, was one of the highest across the 6 towns. Only 2% of respondents identified that they travelled in any other way than car or on foot, and that was by van. This generally indicates that that people visiting Graiguenamanagh are more likely to be travelling into the centre from a location that is easy walking distance of the core shopping area of Graiguenamanagh. No respondents travelled to the centre by any form of public transport, reflective of the fact that there are very limited public transport options within this centre.

3.75 Of the respondents who did travel to the centre by car or other private vehicle, the most popular location to park their car was on street (32%), while the second most popular was within the Aldi car park (24%). When asked if the availability of parking has an influence on whether to shop in Graiguenamanagh, the most popular response was 'not at all' (44%). The only other town with a higher proportion of 'not at all' responses was Castlecomer.

Figure 4o | Travel to Graiguenamanagh (%)

Mode of Transport	Graiguenamanagh 2019 (%)
Car	60
Walk	38
Bus	0
Bicycle	0
Van	2
Motorbike	0
Train	0
Tour Coach	0
Other	0

Frequency of Visits

3.76 Shopper survey participants in Graiguenamanagh were asked to identify the frequency with which they visit Graiguenamanagh, whether to shop or just look around. Table 4p provides a breakdown for Graiguenamanagh. The survey data shows that a very high proportion of respondents (60%) identified that they travelled to Graiguenamanagh more than 3 times every week. In addition, another 16% of respondents noted that they visited 2-3 times per week, and 7% identified once week.

Figure 4p | Frequency of Visits (%)

Frequency of Visits	Graiguenamanagh 2019 (%)
More than 3 times a week	60
2--3 times a week	16
Once a week	7
Less often	2
2--3 times a month	7
Once every 2 months	4
Once a month	2
First time	2
Work here	0
Total	100

Main Reason for Visiting

3.77 The survey asked respondents about their main reason for visiting Graiguenamanagh. Each respondent was able to identify one main reason, and the results have shown that the most common responses were 'main weekly grocery shop' (33%) and 'other grocery shop (18%) indicating that Graiguenamanagh is an important convenience shopping destination for the surrounding area. The Aldi, located just outside the core retail area and two other convenience units within the centre are therefore considered to be important for the centre's viability. 'Eating / meal out / snacks' was also identified in the five most popular responses for main and secondary reason for visiting, which is a positive indication that despite the high proportion of vacant units, the centre still attracts visitors for leisure purposes.

Table 4q | Reasons for Visiting the Centre

	Main Reason	Secondary Reasons*
1	Main weekly grocery shop (33%)	Nothing in particular (38%)
2	Other grocery shopping (18%)	Other grocery shopping (15%)
3	Eating / meal out / snacks (11%)	Eating / meal out / snacks (13%)
4	Work (9%)	Bank / financial services (8%)
5	Meet friends / family (5%)	Other (6%)

* Respondents could select more than one answer and therefore percentage does not add up to 100%

Qualitative Review

3.78 Turning now to our qualitative factors, respondents were asked what they thought the main attraction of Graiguenamanagh is, and what principle improvements would make them visit more often. Like most of the centres, the main attraction that was identified by respondents in Graiguenamanagh was that the centre is close to their home (25%). The next most popular responses were that parking is free (13%), that there is a good choice of places to eat and drink (13%) and that Graiguenamanagh has a safe environment with limited crime. Interestingly, the next most popular response (11%) was 'the River'. This response indicates that visitors to Graiguenamanagh value the river aspect of the local environment and that this is an important selling point and potential tourist attraction.

3.79 When asked about what principle improvements they would like to see, the most popular responses was 'fewer empty shops', testament to the very high vacancy rate experienced within the town. Complementing this response, the second most popular response was 'more shops' (15%). These responses indicate that residents would like to see a lower vacancy rate and a broader selection of shops and services than are currently offered.

Table 4r | Main Attractions and Principle Improvements

	Main Attraction*	Principle Improvement*
1	Close to home (25%)	Fewer empty shops (33%)
2	Free parking (13%) / Good choice of places to eat and drink (13%) / Safe environment (13%)	More shops (15%)
3	The River (11%)	More parking provision (13%)

*Not including the response 'don't know'

Opportunity Sites

3.80 There are a number of vacant and dilapidated buildings located throughout Graiguenamanagh which offer opportunities for redevelopment. The recent renewal project to improve the walking route between Main Street and the new Aldi is an important example of how small regeneration works can greatly improve the users experience. In the first instance, the very prominent site located at the junction of The Quay and Lower Main Street, currently houses an old pub/hotel. Although there have historically been flooding in the area, the location on the river and the size of the building present an excellent opportunity for refurbishment or redevelopment, probably for hotel, residential or leisure uses. Similarly, the site located at the bottom of Mill Road and at the junction of High Street, is a town centre site that also presents good opportunity for development, albeit the site may be slightly constrained. We recommend that further work is undertaken to confirm ownership and ascertain whether there is a capacity for redevelopment.

3.81 Notwithstanding the identified opportunity sites, there is a high proportion of vacant units within the town, and therefore the take-up and regeneration of these sites should be prioritised ahead of new build development. The Council is currently preparing an application for funding from the Rural Regeneration Development Fund in this regard.

Town Specific Recommendations

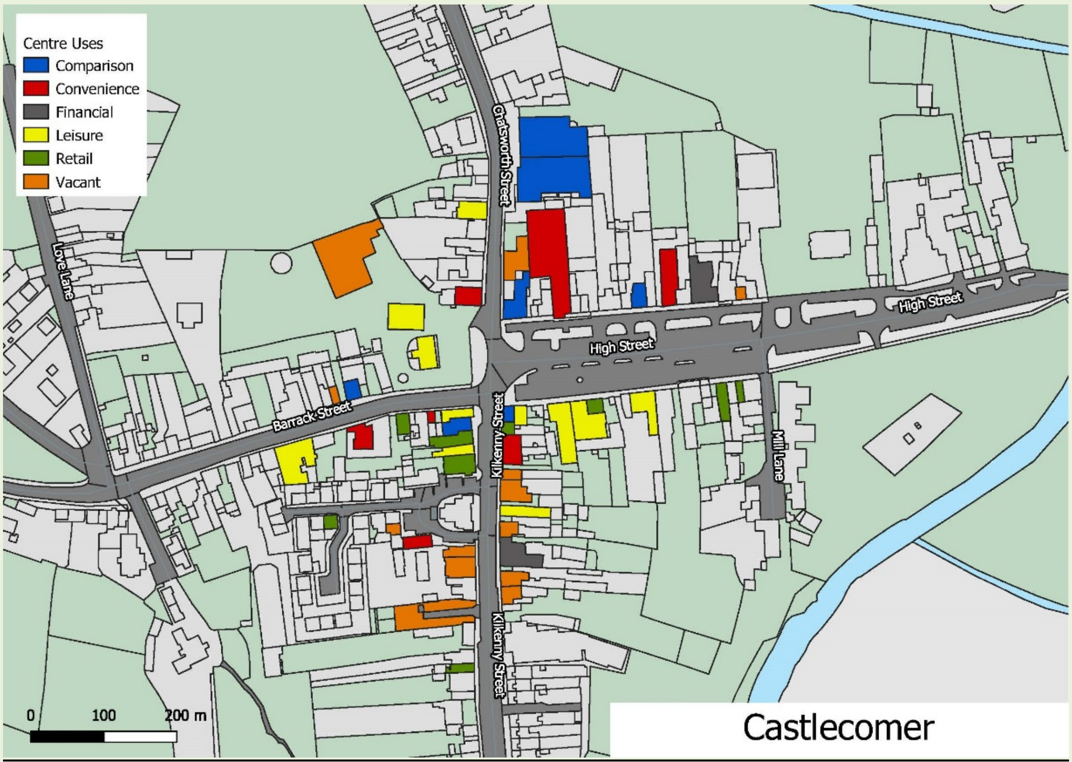
3.82 The shopper survey and town centre composition exercise confirmed that the principle issue facing Graiguenamanagh is the amount of vacant units present in the town. The number of vacancies is having an impact on both the retail performance and public perception of the town. In order to remedy the high proportion of vacant units and improve the viability and vitality of the town centre, we have provided recommendations as outlined below. Common recommendations across each of the towns are included in the conclusions of this chapter.

- Explore opportunities for refurbishment or regeneration of derelict buildings throughout the town, and explore options to utilise compulsory purchase order powers where required;
- Continue to apply for funding opportunities for regeneration and renewal projects within the town centre.

Castlecomer

Health Check Overview

Castlecomer District Town Retail Snapshot	
Designation	District Town
Population	1,502
Number of retail units	49
Major retailers	None



Composition Summary

	No. of Units	Units %
Convenience	7	14.3
Comparison	7	14.3
Retail Services	9	18.4
Leisure Services	11	22.4
Financial and Business Services	2	4.1
Vacant	13	26.5
TOTAL	**49**	**100**

Viability and Vitality

3.83 Castlecomer is one of the four district centres within the County and is located 20 kilometres north of Kilkenny City. The centre consists of 49 retail units, 13 of which were observed to be vacant at the time of assessment. The commercial area of Castlecomer is centred on a crossroads of The Square (also known as the High Street), Barrack Street, Kilkenny Street and Chatsworth Street.

3.84 The viability and vitality assessment has provided an analysis of the health of Castlecomer, and has identified that overall it is an interesting district centre, whose function is slightly different from the remainder of the district centres in Kilkenny County. The centre is located at the junction of major roads which forms a slightly disjointed urban environment, dominated by cars. The shops generally service residents from the local area, and its role within the wider retail hierarchy is for local convenience. The complete health check for Castlecomer is provided at Appendix A and an assessment against the four qualities that can be attributed to a healthy town centre is provided below.

Quality	Discussion
Attraction	While the survey results indicate that for many shoppers the draw of Castlecomer is that it is convenient from either home or work, we also identified that an important attraction of this district centre is its location in close proximity to the Discovery Park. Visitors to the Discovery Park are likely to continue utilising the shops and services in Castlecomer, and therefore this is an important relationship for business operators in the town.
Accessibility	The centre is easily accessible by car from the N78 which runs through the centre of Castlecomer along The Square and Kilkenny Street. The N78 links to the M9 to the north and connects to the N77 close to Kilkenny City Centre to the south, and therefore these are considered to be major roads. Car parking is available throughout the town. Castlecomer is served by a number of bus services, including the 717, which runs every 2 hours between Clonmel and Dublin Airport via Kilkenny, the 890 between Kilkenny Castle and Castlecomer twice daily and 891 between Castlecomer and Loughboy, also twice daily The 890 and 891 services are operated by K Buggy. In terms of movement within the town itself the centre is small enough that it is easy to walk from one part to another, however, the busy road does act as a barrier for pedestrians.

Amenity	The urban environment, suffers from a dominance by roads and car parking. Notwithstanding, opportunities for improvement have been identified, and the centre would benefit from revitalisation. Market Square, for example, with the attractive former courthouse, would lend itself to an area for landscaping and public realm improvements.
Action	Whilst generally observed to be tidy, the centre lacks in areas of public urban realm. The dominance of the road network means that pedestrians are secondary. We consider that works could be undertaken to greatly improve the overall experience for customers, and that this might provide a catalyst for other improvements.

Shopper Survey

3.85 The 2010 shopper survey did not interview shoppers in Castlecomer, and therefore we are unable to provide a comparison of data and attitudes from 2010 as we were for Kilkenny City. Notwithstanding, we have provided an analysis of the results of the 2019 shopper survey for Castlecomer using a range of key topics.

Shopper Origin

3.86 Within smaller centres in the county it has been found that generally speaking it is common for the respondents to live in or near the centre they were interviewed in. In Castlecomer, 43 of the 58 people surveyed, or 74%, were from Castlecomer.

Mode of Transport

3.87 The shopper survey has identified that 64% of shopper survey respondents in Castlecomer travelled by private car, whilst 33% walked. The breakdown is shown in Figure 4s. Only 4% of respondents identified that they travelled in any other way than car or on foot, and that was by bicycle (2%) and van (2%). No respondents travelled to the centre by any form of public transport, reflective of the very limited public transport options within Castlecomer.

3.88 Of the respondents who did travel to the centre by car or other private vehicle, 89% parked their car using on street parking, evidence to the fact that there are no public car parks in the centre. This response was far higher than in any other centre. When asked if the availability of parking has an influence on whether to shop in Castlecomer, the most popular response was 'not at all' (52%), while

17% also responded with ‘not that much’. These responses reflect the overall amount of available on street car parking in the centre.

Figure 4s | Travel to Castlecomer (%)

Mode of Transport	Castlecomer 2019 (%)
Car	68
Walk	33
Bus	0
Bicycle	2
Van	2
Motorbike	0
Train	0
Tour Coach	0
Other	0

Frequency of Visits

3.89 Shopper survey participants in Castlecomer were asked to identify the frequency with which they visit the centre, whether to shop or just look around. Table 4t provides a breakdown for Castlecomer. The survey data shows that a very high proportion of respondents (67%) identified that they travelled to Castlecomer more than 3 times every week, the highest of any of the towns in this Study. In addition, another 10% of respondents noted that they visited 2-3 times per week, and 10% identified once week.

Figure 4t | Frequency of Visits (%)

Frequency of Visits	Castlecomer 2019 (%)
More than 3 times a week	67
2--3 times a week	10
Once a week	10
Less often	5
2--3 times a month	2
Once every 2 months	2
Once a month	3
First time	0
Work here	0
Total	100

Main Reason for Visiting

3.90 We turn now to the main reason that shoppers chose to shop in Castlecomer. Each respondent was able to identify one main reason, and the results have shown that the most common response was 'other grocery shop (34%) indicating that Castlecomer is used more as a destination for 'top-up shopping' rather than the main weekly grocery shop. The lack of a large supermarket may be a reason for this. Notwithstanding, 10% of shoppers surveyed identified that the main reason they were visiting Castlecomer was to undertake their main food shopping.

Table 4t | Reasons for Visiting the Centre

	Main Reason	Secondary Reasons*
1	Other grocery shopping (34%)	Nothing in particular (45%)
2	Work (17%)	Other grocery shopping (14%)
3	Main weekly grocery shop (10%)	Meet friends / family (11%)
4	Eating / meal out / snack (7%)	Bank / financial services (11%)
5	Meet friends / family (5%)	Eating / meal out / snack (5%)

* Respondents could select more than one answer and therefore percentage does not add up to 100%

3.91 When asked for their secondary reason for visiting, the most common response was 'nothing in particular'. Further evidence to Castlecomer being a place that shoppers drop by to carry out top up shopping, 14% stated 'other grocery shopping'. Figure 4t provides a breakdown of responses.

Qualitative Review

3.92 Turning now to our qualitative factors, respondents were asked what they thought the main attraction of Castlecomer is, and what principle improvements would make them visit more often. Like most of the centres, the main attraction that was identified by respondents in Castlecomer was that the centre is close to their home (28%). The next most popular responses are telling, as 19% of shoppers identified that the main attraction of Castlecomer was the Discovery Park. This suggests that the Discovery Park is an important driver for visitors to Castlecomer. The third most common main attraction was that the town is close to work (9%). Other than those that identified the Discovery Park as being the main attraction, it appears the Castlecomer is a convenient shopping destination for those that live and work nearby. Figure 4u provides a breakdown.

3.93 When asked about what principle improvements they would like to see, the most popular response was 'more parking provision.' As we have previously identified, respondents that drove into the centre appeared to be reliant on on-street parking, with there being limited public off street car parks available. The second most popular response was 'more shops' (17%), and 'fewer empty shops' (7%). These second and third most popular response go hand in hand, indicating a dissatisfaction with the range of shops offered

Table 4u | Main Attractions and Principle Improvements

	Main Attraction*	Principle Improvement*
1	Close to home (28%)	More parking provision (26%)
2	Discovery Park (19%)	More shops (17%)
3	Close to work (9%)	Fewer empty shops (7%)

*Not including the response 'don't know'

Opportunity Sites

3.94 Within the core retail area there were limited obvious opportunity sites identified. Just south of the town centre and along Kilkenny Street, a disused convent building is located with frontage to the main road. The site is large, and backs onto River Dinin. The site is located adjacent to the Castlecomer library. There is an existing proposal to convert the convent to residential units.

3.95 The former creamery site next to the Creamery House offers significant opportunity for a mixed use precinct. While the site provides an opportunity to provide new higher quality retail floorspace, any future development should not be at the expense of the existing retail offer.

3.96 In addition, there are a number of vacant units throughout the town that may contribute to poor perception of Castlecomer generally. We suggest therefore that programmes are considered, such as allowing 'pop up' stores to let vacant units in the short term, as a method to these vacant units are filled as a matter of priority.

Town Specific Recommendations

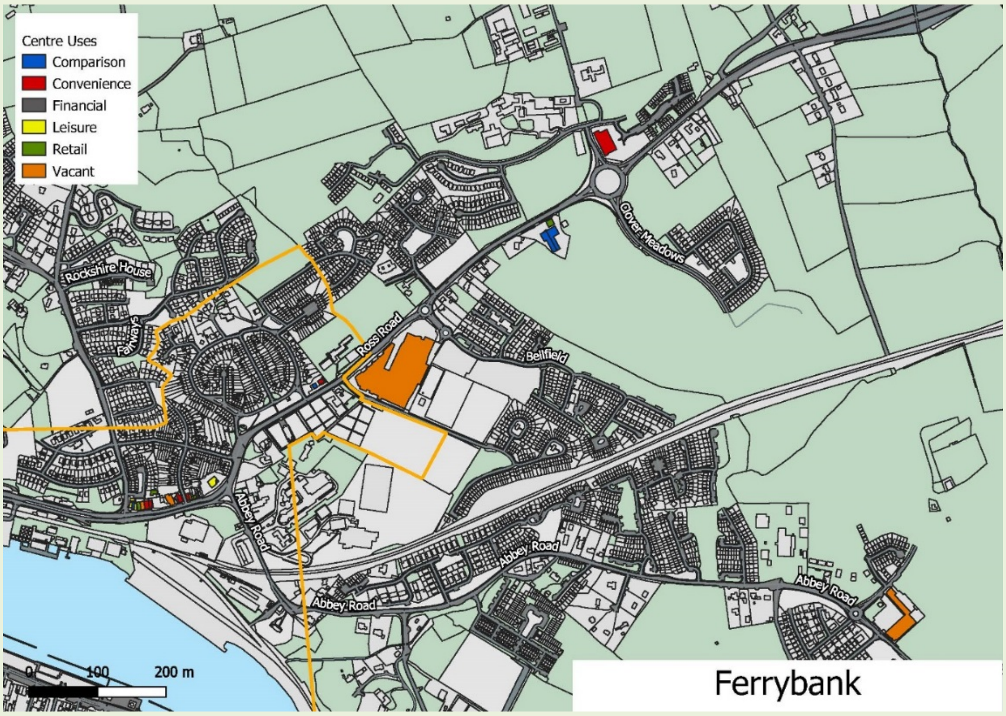
3.97 The shopper survey identified that the main concerns shoppers have specific to shopping in Castlecomer were focussed around car parking, provision of additional shops, and reduction in the number of vacant units. To this end, we provide a series of recommendations as outlined below. Common recommendations across each of the towns are included in the conclusions of this chapter.

- Work with management of the Castlecomer Discovery Park to prepare a strategy to incentivise visitors to that facility to also visit Castlecomer town centre – the construction of a pedestrian bridge to link the Discovery Park with the town centre as is currently planned would be a very important element of such as strategy.;
- Work with local landlords to prepare a strategy for filling vacant units. Consider allowing 'pop-up stores' as a temporary solution in the short term to fill vacant units.

Ferrybank

Health Check Overview

Ferrybank District Centre Retail Snapshot	
Designation	Ferrybank Shopping Centre designated as District Centre in Retail Hierarchy
Population	Estimated at 5,246 in 2017
Number of retail units	26 + 2x shopping centres
Major retailers	Aldi



Composition Summary

	No. of Units	Units %
Convenience	6	21.4
Comparison	5	17.9
Retail Services	6	21.4
Leisure Services	4	14.3
Financial and Business Services	2	7.1
Vacant	5	17.9
TOTAL	**28**	**100**

Viability and Vitality

3.98 Ferrybank is located in the far south of Kilkenny County, just north of the river and on the border with Waterford County. The vacant Ferrybank Shopping Centre was designated as a district centre in the retail hierarchy in the previous Development Plan. The area was designated as such on the basis of the anticipated growth in the area. For the purposes of this assessment, the existing retail and leisure offer in in the area, including the core retail area over the border in in Waterford has been taken into consideration.

3.99 In addition to the Ferrybank Shopping Centre, there is an almost entirely vacant shopping centre at Ross Abbey. One operating store, Mr Price, is located in the Ross Abbey centre The main retail offer to the area is located in a parade of shops along Fountain Street, although it is noted that this parade of shops is located in the administrative area of Waterford City and County. The shops offer a basic range of convenience goods and services that were heavily frequented at the time of the assessment. Other shops and services, though disjointed, extend up towards the Aldi at the roundabout on Belmont Road, which marks the edge of the retail offer.

3.100 Ferrybank presents an interesting case in terms of viability and vitality, as it is not a typical district centre. The function of the retail provision at this location is very much local in nature, complementary to the larger city of Waterford located on the other side of the River Suir. The majority of units are either included in the convenience goods category or the retail services category. Notwithstanding the offer is clearly important to supplement other more comprehensive services further afield. The vacant Ferrybank Shopping Centre provides an imminent opportunity to create a genuine district centre for the area, and a substantial offer of comparison goods floorspace. We would expect that if the shopping centre floorspace was to be rejuvenated, this would have some impact on the existing units elsewhere in Ferrybank, although it is likely that these stores would provide different retail offers.

3.101 The complete health check for Ferrybank is provided at Appendix A. In order to provide an overview of the assessment of viability and vitality, an assessment against the four qualities that can be attributed to a healthy town centre as identified in the 2012 Retail Planning Guidelines is provided below.

Quality	Discussion
Attraction	Like most of the smaller centres in the study, Ferrybank's main attraction appears to be that it is convenient, particularly for doing grocery shopping. The majority of the shoppers interviewed lived either in Ferrybank or in Waterford, nearby.
Accessibility	The centre is easily accessible by car from the R711 which connects the N29 runs which runs through from the Port of Waterford until it join the N25. Car parking is available outside the Spar, though the car park was observed to be in poor condition. The vacant shopping centre also offers a sizable car park, and this is currently used by the Ferrybank Area Office and Library. Overall the centre is considered to be easily accessible by car, although there is limited opportunity to stop by the existing parade of shops.
Amenity	Ferrybank provides little in the way of public realm or high quality built environment. The car dominated environment presents an unpleasant setting for pedestrians, and there was little in the way of street furniture or landscaping.
Action	This quality relates to the centre being commercially viable and functioning effectively. At present, the shopping centre is vacant and therefore the centre is not functioning effectively. While fulfilling a role at present, the parade of shops and other units located further up Belmont Road, do not function as a district centre in isolation.

Shopper Survey

3.102 The 2010 shopper survey did not interview shoppers in Ferrybank, and therefore we are unable to provide a comparison of data and attitudes from 2010 as we were for Kilkenny City. Notwithstanding, we have provided an analysis of the results of the 2019 shopper survey for Ferrybank using a range of key topics.

Shopper Origin

3.103 Of those shoppers surveyed in Ferrybank, only 36% lived in Ferrybank. This is a stark contrast to the other towns in this survey, whereby generally at least 60% of respondents lived in or near the location they were being surveyed. In the case of Ferrybank, the response was far lower, and actually the survey identified that respondents were more likely to be from Waterford (46%) than Ferrybank.

Mode of Transport

3.104 The shopper survey has identified that 54% of shopper survey respondents in Ferrybank travelled by private car, whilst 45% walked. The breakdown is shown in Figure 4v. One shopper surveyed noted that they travelled by bus.

3.105 Of the respondents who did travel to the centre by car or other private vehicle, 90% parked their car using on street parking, suggesting there are limited other options in this area. This response was far higher than in any other centre. When asked if the availability of parking has an influence on whether to shop in Ferrybank, the responses were polarising, with 48% of respondents choosing 'to a large extent' and 43% choosing 'not at all'.

Figure 4v | Travel to Ferrybank (%)

Mode of Transport	Ferrybank 2019 (%)
Car	54
Walk	45
Bus	2
Bicycle	0
Van	0
Motorbike	0
Train	0
Tour Coach	0
Other	0

Frequency of Visits

3.106 Shopper survey participants in Ferrybank were asked to identify the frequency with which they visit the centre, whether to shop or just look around. Table 4w provides a breakdown for Ferrybank. The survey data shows that a very high proportion of respondents (64%) identified that they travelled to Ferrybank more than 3 times every week. In addition, another 16% of respondents noted that they visited 2-3 times per week, and 5% identified once week.

Figure 4w | Frequency of Visits (%)

Frequency of Visits	Ferrybank 2019 (%)
More than 3 times a week	64
2--3 times a week	16
Once a week	5
Less often	7
2--3 times a month	0
Once every 2 months	2
Once a month	2
First time	0
Work here	4
Total	100

Main Reason for Visiting

3.107 When asked to identify their main and secondary reasons for visiting Ferrybank, the most popular main reason for visiting was 'other grocery shopping' (20%). Considering the fairly high proportion of convenience goods units within the area surveyed, this is not surprising. When combining this figure with the 11% of respondents who noted their main reason for visiting was to undertake their 'main weekly shop', a picture of convenience shopping is presented. 'Other' reasons received 16% of responses, while 'work' was responsible for 11% of visits.

3.108 When asked for their secondary reason for visiting, the most common response was 'nothing in particular', which was generally the case across all survey locations. Further evidence to Ferrybank being a location for local residents to carry out their top up shopping, 14% stated 'other grocery shopping',6% of respondents identified that their secondary reason for visiting was to visit a bank or financial institution, while 4% noted 'eating / meal out / snacks' and 4% noted 'meet friends / family'.

Table 4q | Reasons for Visiting the Centre

	Main Reason	Secondary Reasons*
1	Other grocery shopping (20%)	Nothing in particular (55%)
2	Other (16%)	Other grocery shopping (14%)
3	Work (11%)	Bank / financial services (6%)
4	Main weekly grocery shop (11%)	Eating / meal out / snack (4%)
5	Nothing in particular (9%)	Meet friends / family (4%)

* Respondents could select more than one answer and therefore percentage does not add up to 100%

Qualitative Review

3.109 Turning now to our qualitative factors, respondents were asked what they thought the main attraction of Ferrybank is, and what principle improvements would make them visit more often. Like most of the centres, one of the main attractions that was identified by respondents in Ferrybank was that the centre is close to their home (23%). However, the most popular response was 'no particular reason / don't know' (27%). This response was higher than in any other location, though we haven't included it in Figure 4r. The next most common main attraction was that the centre has free parking (11%) and 'other' (11%).

3.110 When asked about what principle improvements they would like to see, the most popular response was 'more shops,' which is interesting considering the vacant shopping centre located in Ferrybank and within close proximity of the main parade of shops in the centre. The next most popular responses were 'other' and 'more parking provision.

Table 4r | Main Attractions and Principle Improvements

	Main Attraction*	Principle Improvement*
1	Close to home (23%)	More shops (39%)
2	Free parking (11%)	Other (13%)
3	Other (11%)	More parking provision (5%)

*Not including the response 'don't know'

Opportunity Sites

3.111 Being a non-traditional centre, there are limited obvious opportunities for development in the same way that opportunity sites have been identified for Kilkenny city and the other country towns. However, it is noted that both the vacant Ferrybank Shopping Centre fronting Belmont Road, as well as the Ross Abbey shopping centre could be considered to be major opportunities for development. The Ross Abbey centre, which is partially in use, is likely to be less challenging than the Ferrybank shopping centre, as it is of a smaller scale. The Ferrybank shopping centre is far more challenging, and it is suggested that repurposing or alternative uses are considered, either in conjunction with the planned retail uses, or as a complete change of use.

Town Specific Recommendations

3.112 The shopper survey has identified that shoppers in Ferrybank desire additional shops as their principle improvement. We expect that this is in part a result of the vacant shopping centre, and a reflection of the impact that this vacancy has had on local residents, the 'potential' of which is constantly visible. In 2015 Waterford Council sought SDZ designation for the North Quay Area of the Waterford City, with is strategically linked to the wider Ferrybank settlement. The future redevelopment of this North Quay Area is expected to enhance and transform Waterford with major knock on effects for Ferrybank and Kilkenny County. In order to promote the vitality and viability of Ferrybank, we provide the following recommendations below. Common recommendations across each of the towns are included in the conclusions of this chapter.

- Continue to engage with Waterford City and County Council in the support of sustainable retail provision in the Ferrybank area, and in particular, as the North Quay Area comes forward for development;
- With the proposed link road between Belmont and Abbey road likely to come forward in the near future, Ferrybank has the potential to be an important retail location. Work with the ownership and management of the vacant shopping centres to formulate a strategy to bring the shopping centre into use as a shopping centre. Or alternatively if considered unviable, then consider how the shopping centre could be repurposed for alternative uses. Options that may be considered include residential, leisure or performing arts.

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Conclusion

3.113 Throughout this chapter we have utilised survey data and health check information including observations, to provide an assessment of the vitality of Kilkenny City and each of the towns. As part of this assessment, town specific recommendations have been made that would help to create viable and vibrant places. In addition the town-specific recommendations, common recommendations for all towns within the County have been outlined below:

- Continue to ensure that future retail development is directed towards the core retail areas of each town as a first priority, and other parts of the existing retail footprint that are outside the core retail area next, in accordance with the Retail Planning Guidelines;
- Develop a strategy to incentivise filling vacant units, and particularly those units that have been vacant for a long period time. By way of example this could be achieved by formulating a programme to assist small businesses and start-ups to rent vacant units for cheaper than market rents, for an agreed period of time. Kilkenny County Council already has a scheme called the Small Business Vacant Premises Scheme, which assists small businesses by providing a grant to help pay rate charges, and programmes such as this one should continue to be supported in an attempt to reduce the overall vacancy rate across the County;
- Prepare a transport and mobility strategy to provide a platform for the improvement of accessibility, and having particular regard to the urban environment for pedestrians and cyclists. This is already underway in Kilkenny City;
- Improve on the already existing shop-front guidance, which provides advice to local retailers around the appropriate design of shopfronts in historic environments, and make it more widely available.

4.0 Retail Strategy

Introduction

4.1 Having undertaken detailed assessments of each of the listed towns within the County through the health check process, the following is a series of recommendations to Kilkenny County Council. Specifically, the Council's Brief asks us to comment on:

- The level and form of retail activity within different tiers of the settlement hierarchy;
- The definition of core retail areas;
- A comparative review of the retail performance of Kilkenny City against major competing centres;
- Analysis of the change that has occurred within the County since the last Retail Strategy was prepared;
- Out of centre retail in Kilkenny.

Review of Retail Hierarchy

4.2 As expected, Kilkenny City sits at the top of the hierarchy as a major town centre / county town. Ferrybank is included at the second tier as a district centre, the tier above the remaining district towns of Callan, Castlecomer, Graiguenamanagh and Thomastown. Based on our health check assessments, Ferrybank does not meet the criteria for a district centre at the current time. This is discussed further overleaf. As Ferrybank straddles the boundary between Kilkenny and Waterford Council's, any re-assessment in the hierarchy should be discussed in detail with Waterford CCC, through the joint retail strategy that is to be prepared. In particular, we are cognisant that there are plans to redevelop the North Quays, including the development of 60,000 sq m of retail units, leisure and office space. Tiers 4 and 5 are comprised of neighbourhood centres (defined) and small town/village centre / rural areas (various).

4.3 While the 2012 Retail Guidelines are silent on how to designate centres to the various tiers of a hierarchy, the National Planning Framework (2018)(NPF) provides some guidance. The table at Figure 4.1 is an extract from the NPF that identifies the appropriate level of commercial development within four tiers. The four tiers are cities, large towns, smaller towns and villages, and smaller settlements and rural areas. We have therefore utilised these tiers as a broad guide to inform our assessment of the appropriate level of retailing activity appropriate within the County.

Figure 4.1 | NPF Guidance around appropriate level of commercial development

Tier	NPF Guidance for Commercial Development
1 – Cities	Department Stores Specialist shops Arts and cultural facilities
2 – Large towns	Shopping centres Retail warehousing Range of restaurants
3 – Smaller towns and villages	Supermarkets Restaurants Mix of retail facilities
4 – Smaller settlements and rural areas	Shop Pub Post office Petrol station

4.4 To start the exercise, we have conducted a high level assessment of the listed towns to establish the baseline situation (building on the work undertaken in section 3 of this report). In order to benchmark the level of retail activity against the NPF guidance, we have identified a set of 'defining factors' for each of the listed towns. Following this, we go on to provide commentary around each town.

Figure 4.2 | Assessment of Centre in Relation to Retail Hierarchy

Centre	Number of units[24]	Defining factors	NPF Tier	Commentary
Kilkenny City	450	• Main town and retail destination in the County • Department stores – Dunnes • Range of specialist shops • Arts and cultural facilities and centre of the County • Shopping centres • Series of supermarkets	Large Town	• Adequate offering in all retail categories • Possibly compromised by heritage aspects and smaller floorplates of older buildings • Larger floorplates may attract larger retailers • Additional convenience retailing within the town centre may assist with consumer choice and drive linked trip.

[24] Unit numbers comprised of all convenience, comparison, retail services, leisure services, financial and business services, and vacant units.

Centre	Number of units[24]	Defining factors	NPF Tier	Commentary
Ferrybank	28	• Supermarket (Aldi) • Some restaurants and leisure services (limited) • Small range of retail • Fragmented retail offer, suffering as a result of the vacant shopping centre. If the shopping centre were to be in use, this centre may be elevated to tier 2 – large towns, in terms of its commercial offer as defined by the NPF.	Currently operating within the smaller towns and villages category. Its future in the retail hierarchy should be decided as part of the joint retail strategy with Waterford CCC.	• Ferrybank does not currently have a big enough offering of units to make it a retail destination. Missing a core offering of retail and leisure that draws consumers for more than just their top-up shop

Centre	Number of units[24]	Defining factors	NPF Tier	Commentary
Callan	72	• Aldi and Supervalu supermarkets make up main convenience retail offer • Offer of restaurants and other leisure services • Offers a mix of retail facilities serving the local population • Series of vacant units in the north of the commercial area	Smaller towns and villages	• An improvement to the offering of comparison retail units within the town may assist in diversifying the current offer. • Reducing the overall proportion of vacant units would help improve the perception of certain parts of the town.
Castlecomer	49	• Anchored by a Eurospar and Londis supermarket • Offer of restaurants • Limited offer comparison goods • Retail offer local in nature	Smaller town and villages	• Similar to Callan, the current offer within Castlecomer is lacking in comparison goods.

Centre	Number of units[24]	Defining factors	NPF Tier	Commentary
Graiguenamanagh	49	• Anchored by SuperValu store in the centre of town • Aldi supermarket located on the edge of the town • Small offer of restaurants and other retail services • Suffers from high vacancy rate • Potential with key opportunity sites throughout the town	Smaller town and villages	• Decreasing the number of vacant units within the town likely to assist in improving the overall perception of the town. • May benefit of increased leisure offer to improve footfall.
Thomastown	64	• Lidl & SuperValu located on the edge of the town • Offer of leisure and retail local in nature • Mix of retail facilities	Smaller town and villages	• Provides a local but good mix of retail facilities and services.

Kilkenny City

4.5 Kilkenny City is the major centre and therefore focal point of retail activity in the County. In order to remain so, retail activity should continue to be directed towards Kilkenny City Centre in the future. This is particularly important to ensure that the centre can compete with other major cities in adjoining counties such as Waterford, Portlaoise, Clonmel and Carlow.

4.6 Comprised of 450 units, Kilkenny City Centre offers a range of shops, services and facilities, including Dunnes department store, of which there are two within the area surveyed. In addition to shops along the various main streets, there are also two shopping centres within the town centre, both attracting significant footfall. We noted during our site visits that the majority of units across the City were occupied by independent retailers, and there was a substantial offer of speciality shops. This is an important selling point for the city.

4.7 Kilkenny City is a popular tourist destination and is also the cultural hub of Kilkenny County. This is an important focal point and a key attractor of visitors from the County and from further afield. Kilkenny Castle attracts in the order of 800,000 visitors every year.

4.8 In July 2015, the Council approved an Urban Design Framework and Masterplan for the Abbey Creative Quarter on the west bank of the River Nore with a particular focus on the site of the former Smithwick's Brewery. This mixed use development is expected to increase the overall footfall within that part of the City Centre as well as providing public open space and beneficial urban realm.

4.9 Kilkenny's leisure service offer is also unrivalled across the County. The new IMC Cinema located at Barrack Street at the edge of the centre, is expected to enhance this leisure offer.

4.10 Kilkenny's retail offer is expected to continue to grow and improve over time, given its targeted growth in terms of both population and employment base in the NPF. The remaining district towns do not come close to competing with Kilkenny's offer, particularly in relation to comparison goods stores. Notwithstanding this dominance, Kilkenny has a lower proportion comparison goods stores and comparison goods floorspace compared with the Irish average (see Appendix A – 35% floorspace compared to the Irish average of 42%). To some extent, this indicates that the City offers a more diverse range of retail, leisure and financial and business services than is generally expected for a centre of this size.

Smaller Towns and Villages

4.11 The four district towns in the County are generally focussed around providing local shops and services that service the town's immediate catchment area. It is important that the district towns continue to support Kilkenny as the major town in the County, and do not grow large enough to compete.

4.12 Based on an assessment of the current district towns, we would generally expect the number of units within each district town to be within the order of 10 to 100 units. As per the NPF, we would expect such centres to be characterised by having at least one supermarket, as well as a range of restaurants and a broad mix of retail outlets. Such centres though, would not be expected to offer as diverse range of cultural and community facilities, or out of centre retail, as centres higher up the hierarchy. As detailed in Appendix A, the district towns were generally found to have a lower proportion of comparison goods stores compared with the Irish average, which is further testament to the fact that Kilkenny City is the major comparison goods destination in the County.

Callan

4.13 Callan is anchored by a SuperValu supermarket on Green Street and also has an Aldi store not far from the core retail area. This convenience offer is important, and the SuperValu in particular was observed as being very popular. There are 72 retail units in the centre. The remainder of the current retail offer in the town consists of primarily a mix of local services and facilities serving the local hinterland. There was a small proportion of leisure services identified, albeit a lower proportion than the Irish average. Increasing the number of comparison goods units may help to draw footfall to the town.

Castlecomer

4.14 Castlecomer consist of a total of 49 units, 7 of which were identified as convenience units. The largest convenience store in the centre is a Eurospar. The remainder of shops and services were mostly observed to be local in nature, serving the local hinterland, and there was a limited range of restaurants. As a result, Castlecomer is considered to meet the NPF's guidance around the level of commercial development of a smaller town and village. Similar to Callan, Castlecomer was observed to have a very limited offer of comparison goods units. An increase in the number of clothes and footwear stores, for example, may assist in drawing additional customers.

Graiguenamanagh

4.15 Graiguenamanagh is anchored by a SuperValu store in the centre of town. There is also an Aldi located outside the Core Retail Area (see Appendix E), which contributes to the overall convenience offer. Interestingly, these two units along with one other are the only two convenience goods units in the centre. While the proportion of comparison goods retailers is also low, Graiguenamanagh has a steady offer of both retail and leisure services serving the local population. While the centre suffers from a particularly high vacancy rate of 32.7%, this also presents a range of opportunity sites for future development and regeneration.

Thomastown

4.16 Thomastown, like the other district towns, provides shops and services that are local in nature and serve the local hinterland. The centre has a very limited offer of comparison goods and, as we have discussed, Kilkenny City is the dominant in this regard within the County.

4.17 In addition to the four convenience goods stores located within the core retail area of the town, a Lidl and a SuperValu are located further north of the centre. Their location outside of the town centre may have had a negative impact on the stores in the town centre themselves, drawing trade away from those stores. The centre was identified as having an abundance of leisure services in the form of cafes and restaurants which assists with footfall.

Ferrybank

4.18 Ferrybank is a particularly interesting centre. Whilst it is included within the district centre category of the retail hierarchy, the area is geographically divided by Kilkenny County and Waterford. If the shopping centre were to be active, Ferrybank's role in the wider retail hierarchy would improve substantially.

4.19 At present, Ferrybank offers a range of shops and services mostly local in nature. Its location in close proximity to Waterford City means that any retail development in this area is likely to complement Waterford's offer rather than compete. The current retail mix offers a range of convenience stores, leisure services and retail services, meaning Ferrybank currently falls neatly within the smaller towns and villages category of the NPF.

4.20 To fulfil its role as a district centre, one or both of the existing vacant shopping centres within the Ferrybank area would need to come into use. While the centre provides a basic level of retail service, the provision is currently disjointed, and would benefit from a focal point and improved public space, to make it a 'destination' rather than just a stopping point for a 'top-up' shop.

Smaller Settlements

4.21 Smaller settlements across the County in the likes of places such as Knocktopher, Glenmore and Kells generally offer very limited shops and services such as a convenience store, petrol filling station, pharmacy, and a pub or bar. We would not usually expect these smaller settlements to exceed more than 10 units. Further, the offer of these settlements should not compete with the offer of the District Towns.

Core Retail Areas

4.22 The brief asks us to define the extent of the Core Retail Areas (CRA) of the listed towns. This exercise provides us with the opportunity to review the geography of each town in terms of its retail offer. For each of the listed towns we provide a summary of the outcome of our review below. The mapping exercise for each centre is included at Appendix E.

4.23 Neither the Retail Planning Guidelines nor the NPF provide a specific definition of a CRA and therefore we refer to section 4 of the Kilkenny County Development Plan 2014-2020. That Plan designated a CRA for Kilkenny City and did not designate CRAs for the district towns as they were considered to be of insufficient scale to warrant such an approach.

4.24 The 'approach' in this case, refers to the sequential approach, whereby retail development is directed towards CRAs as a first priority, before being directed towards edge-of-centre sites, after which, out of centre sites may be considered. The 2012 Retail Planning Guidelines define the edge of centre area as between 300 and 400 metres of the CRA (to be confirmed in individual circumstances). In the case of Kilkenny City, the 2014 Development Plan designated a CRA and incorporated an isochrone of 400 metres around the CRA. There is a presumption against large, out-of-centre retail development.

Kilkenny City

4.25 Kilkenny City has by far the most extensive retail offer of any of the listed towns included in the study. The River Nore divides the city into two clear areas. The Kilkenny Castle and the main shopping streets of High Street / Parliament Street are located to the east bank of the River, whilst Lower and Upper John Street lead to the MacDonagh Junction Shopping Centre and the train station on the opposite bank.

4.26 The Core Area for Kilkenny is clearly comprised of High Street (including Market Cross Shopping Centre), Rose Inn Street and St Kieran's Street, and our review finds that there has been limited change since the previous designation was made to warrant any major diversion from the previous CRA as identified in the 2014 Development Plan. Notwithstanding, we have provided a CRA plan at Appendix E.

4.27 The Development Plan provides that for all significant retail development, applications should be assessed against a range of criteria. In the case of Kilkenny City, the Plan identifies that for developments of 1,000 sq m (gross) convenience floorspace and 2,000 sq m (gross) comparison floorspace outside the CRA, the sequential approach should be demonstrated and the proposal assessed against a range of criteria.

4.28 We note that the Council has an adopted Masterplan for the Abbey Quarter area. For clarity, in keeping with Policy RPO55 of the Regional Spatial & Economic Strategy for the Southern Region (2020), the sequential approach would apply to Kilkenny City and the CRA we have recommended would help structure that exercise. However, in further keeping with Section 4.4 of the Retail Planning Guidelines (2012) we would anticipate that the Council's policies would make it clear that application of the sequential test would exclude allocated and/or master planned sites, where planning applications are in accord with the policies and objectives of a development plan, in order that their delivery is unimpeded. The purpose of that exclusion is so that where a planning application comes forward for retail development that is in an edge-of-centre or out-of-centre location, but where the site has been allocated or planned by the Council for that particular retail use, the applicant should not have to carry out a sequential test. Where an application is coming forward on a separate edge-of-centre or out-of-centre site, the applicant would still have to consider an allocated or masterplanned site as part of their own sequential test.

4.29 We discuss the application of the sequential test further in our policy consideration at Section 5 (Policy 4).

District Towns

4.30 For the district towns, we recognise that the retail offer may not be large enough to warrant a CRA in the same way that a CRA is appropriate for Kilkenny. Notwithstanding, we consider there is value in some form of designation for a retail area within the district towns and that ideally, the focus for new retail development should be in that retail area. In the case of the district towns, the 2014 Development Plan identifies that all proposals for 500 sq m (net) convenience and comparison should be considered against the sequential approach criteria. At the present time, this is a blanket approach that does not prioritise sites in a central location (as no CRA was designated). We recommend that policies are incorporated that do prioritise sites in the main retail areas of the district towns. We envisage that this would provide a policy platform for regeneration in those district towns. As such, recommendations for CRA designations in the district towns are provided at Appendix E and the discussion provided in the following sections. However, we recommend that the edge-of-centre area for the district towns is reduced substantially to 100m, to reflect the lesser retail offer.

Callan

4.31 The CRA of Callan is generally located around Green Street (the main shopping street), West Street, Mill Street and Upper Bridge Street. Notably, the Council has produced a draft Callan Town Improvement Plan (2018). This document details a number of proposed improvements to the town, including a regeneration strategy and masterplan for the under-utilised and/or derelict buildings on Bridge Street/Mill Street.

4.32 We therefore recommend that the CRA encompasses all retail units with frontage to Green Street, between Chapel Lane and West Street. We also recommend that the CRA comprise the units in use on the northern side of West Street both east and west of Green Street.

4.33 Further north of the junction of West Street and Green Street is Upper Bridge Street. This part of the town was obviously historically part of the town centre and used for retail, however at the present time, almost all were observed to be vacant units. There are also sporadic retail units further north of the Kings River. Overall, we recommend condensing the CRA to avoid the centre becoming needlessly elongated. While the vacant units along Upper Bridge Street offer an opportunity for regeneration, at present they provide limited contribution to the centre's retail offer. It is recommended that opportunities for niche shopping be explored in a Bridge Street rejuvenation project if the street is to remain part of the CRA.

Castlecomer

4.34 The commercial area of Castlecomer is centred on a crossroads with The Square (also known as the High Street), Barrack Street, Kilkenny Street and Chatsworth Street. This area is recommended to form the basis for the CRA. While the extent of the boundaries can be the subject of debate, our observations have shown that there is a clear natural break for the CRA along each street, generally marked by an in use retail unit.

Graiguenamanagh

4.35 Graiguenamanagh's main shopping street can very clearly be identified as being along Lower Main Street. The CRA is therefore recommended to include all units along Lower Main Street with street frontage. In addition, the CRA is recommended to include retail units with frontage to High Street up to the junction with Mill Road. In addition, we recommend including historical retailers such as Cushendale Woollen Mills and Duiske Glass Gift Shop. The area also encompasses the opportunity site identified on the northern side of Mill Road at the Junction with High Street. The vacant unit on Turf Market has not been incorporated. Units along The Quay have been incorporated, as the waterfront presents an opportunity for town centre development, particularly uses that are aimed at tourism.

Thomastown

4.36 The CRA of Thomastown is comprised primarily of Market Street, Pipe Street, Logan Street and Low Street, which are set out in a square formation. Our recommendation for designation of a CRA involves including all units with frontage to these roads, in addition to units just beyond the square formation in retail uses.

4.37 Further north of this area are a SuperValu and Lidl. These are not included in the CRA, as they are not located within easy walking distance of the remainder of the CRA. The availability of parking for these units is also likely to mean that customers are less likely to link their trips to others stores in the CRA.

Comparative Review of Kilkenny City

4.38 The brief has asked us to provide a comparative review of Kilkenny City with other major competing centres nearby. In evaluating the retail alternatives which currently exist within easy access to the main settlements of Kilkenny, such as Portlaoise, Waterford, Carlow, Clonmel and Wexford, it is clear that these regional retail attractors are amongst the biggest competition to the existing retail offer in the County.

4.39 In order to undertake this exercise we have examined a range of key indicators at Figure 4.3. We examine the classification and number of outlets in each centre in order to set the scale of each centre in context, whilst we examine vacancy rates and prime retail rents to characterise the demand for retail space in each centre. Population growth is considered in order to set the relevant growth strategies for each area in context, whilst we draw data from our empirical survey to understand the draw of visitors to Kilkenny City from each competing centre to understand the importance of 'inflow' in each case.

Figure 4.3 | Assessment of Major Competing Centres to Kilkenny City

Centre	2012 Retail Guidelines Classification	Drive-time[25] (mins)	Vacancy Rate[26]	Number of Outlets[27]
Portlaoise	Regional	49	15.1%	373
Waterford	Metropolitan	43	17.1%	582
Carlow	Sub-regional	28	18.3%	439
Clonmel	Regional	46	18.3%	386
Wexford	Regional	76	12.3%	509
Kilkenny	Regional	0	14.7%[28]	450

25 Google Maps
26 Vacancy rates taken from 'Geoview Commercial Vacancy Rates – Q2 2019'.
27 Experian Goad 2017, with the exception of Kilkenny which is Nexus 2019
28 Kilkenny figure taken from Geoview, rather than the equivalent Nexus figure (16.9%). This is to ensure consistency of reporting basis (nb. Geoview draw their findings from areas beyond Town Centres).

Centre	Prime Retail[29]Rents (sq m/per annum)	On-street Survey Visitors to Kilkenny City[30]	Planned Population Growth for County Areas to 2040[31]
Portlaoise	€500-€600	1.7%	11,000-13,000[32]
Waterford	€300-€400	4.7%	21,000-28,000
Carlow	€300-€400	6.0%	7,000-8,500
Clonmel	€200-€300	0.3%	11,000-13,500
Wexford	€300-€400	2.7%	20,000-23,500
Kilkenny	€500-€600	n/a	13,000-15,500

4.40 The analysis suggests that Kilkenny sits healthily alongside its nearby competition. Only Wexford has a lower vacancy rate, and only Portlaoise has comparable prime retail rents.

4.41 We have also examined the responses to Question 2 of our on-street survey whereby we asked respondents where they had travelled to Kilkenny City from. This helps to build a picture regarding the relative appeal of Kilkenny to residents elsewhere. The results showed that 66.7% of visitors to the centre derived from Kilkenny County itself. Of the remaining 33.3% of visitors arriving from outside the County, the largest proportions, other than from international destinations (6.2%), were from Carlow (6.0%) and Waterford (4.7%). This is perhaps to be expected given their relative proximity to Kilkenny, especially Carlow, though it is also indicative of the relative pull of Kilkenny City Centre over the retail/leisure offer in both those destinations.

4.42 We go on to review each of the competing centres below in order to better understand their characteristics and the latest retail strategies of their Councils.

4.43 Portlaoise is identified as a Regional town (other large towns) in the 2012 Retail Planning Guidelines. The Laois County Retail Strategy 2017 notes that the composition of the retail provision is characterised by independent retailers, much like Kilkenny City. The heart of the retail offer is comprised of Main Street with offshoots onto Hinds Square, Lyster Square, Grattan Street, Church

[29] Based on Nexus research of a range of property websites
[30] Nexus Survey 2019
[31] Draft RSES figures (2018)
[32] County Laois figure is to 2031

Street, Railway Street, Bridge Street, Borris Road and Mountmellick Road. A large amount of retail floorspace has been developed in Kylekiproe just south of the main retail offer and is therefore is beginning to compete with Portlaoise town centre. The Laois Shopping Centre containing Penneys and Tesco in addition to Dunnes, Lidl and Aldi Stores and retail warehousing are all based in Kylekiproe.

4.44 Waterford is identified in the metropolitan category of the 2012 Retail Planning Guidelines, along with Cork, Limerick/Shannon and Galway. This provides an immediate indication that Waterford is a step above Kilkenny City in terms of its retail offer and therefore is potentially considered a more attractive investment and development opportunity. Notwithstanding, the Waterford City Retail Strategy notes that Waterford faces challenges regarding expanding its retail offer, due to geographical and archaeological constraints, and access issues. The Strategy also notes that the City faces pressure due to the improving retail offer of other competing town centres nearby, of which an example would be Kilkenny City.

4.45 Carlow is located 37 kilometres northeast of Kilkenny. The core town centre area has historically been located at Tullow Street and Dublin Street, although more recently development has been south east of the town centre. The centre is identified as a sub-regional town in the 2012 Retail Planning Guidelines. The Carlow County Retail Strategy identifies that the centre provides a diverse range of retail and non-retail uses, along with a wide variety of services that complement the retail offer including independent boutiques, financial and business services, and other alternative retail provision.

4.46 Clonmel is a regional town located in County Tipperary, south west of Kilkenny. Its core retail area is comprised of O'Connell Street, Mitchell Street and Market Street. The County retail Strategy identifies that the town is well represented by national and multinational large format convenience stores. At the time of that Retail Strategy, the comparison goods offer in the town was considered to be poor.

4.47 Wexford is the administrative, retail and business capital of County Wexford, and is located on the south east coast. The town centre is formulated around the Main Street with a series of radial lanes and side streets linking to the waterfront and the High Street. The County Retail Strategy identifies that there is a mix of independent retailers and national multiples that contribute to the overall diversity of uses. Bulky goods retailers are located at retail parks at Drinagh, Clonard and Ardcavan. There are also a range of leisure and culture facilities within the town. As Wexford is located slightly further away than some of the other more accessible competing centres, we would expect less direct competition with Kilkenny.

Analysis of Change

4.48 The brief asks us to comment on how retailing in County Kilkenny has changed since the last Retail Strategy was prepared. This relates in particular to the shopper survey data that was collected by Ipsos MRBI, and the evaluation that was provided in section 3 of this report. In particular, we compared the results of the current survey against the results of the survey undertaken as part of the previous Retail Strategy.

4.49 In addition to providing analysis of the shopper survey data, we also undertook an exercise in comparing the composition of retail units in each of the six listed towns in the County against Irish averages. This exercise allows us to benchmark each centre against the national standard, based on Experian data, and provides a useful tool in appreciating what the 'norm' is at any given time.

4.50 In regard to delivery of retail floorspace, Table 4.4 of the 2014 Kilkenny County Development Plan provides final adjusted indicative floorspace capacity to 2020. The table identifies that by 2020 there would be capacity for 1,599 sq m of additional convenience floorspace, 16,502 sq m of additional comparison goods, and -4,391 sq m of bulky goods. While updating these figures was not part of the brief, it is still useful to be able to provide an evaluation of whether that floorspace has been delivered. The extracted details are contained at Figure 4.4.

Figure 4.4 | Floorspace Requirements based on Kilkenny County Development Plan 2014-2020

Table 4.7: Final adjusted Indicative Floor Space Requirements			
	2012	2014	2020
Convenience	3,497m^2	-1,409m^2	1,599m^2
Comparison	11,587m^2	8,525m^2	16,502m^2
Bulky Goods	- 6820m^2	-5992m^2	-4391m^2

4.51 We note that the figures have been adjusted based on floorspace that was extant at the time the last Retail Strategy was prepared. This included 4,577 sq m of convenience floorspace and 4,341 sq m of comparison floorspace within Ferrybank district centre. While the shopping centre has been constructed, it remains vacant. However, considering that it could theoretically come into use at any stage, we have not amended the capacity figures based on the continued vacancy.

4.52 We have undertaken a review of all planning applications for new retail floorspace that have come forward since the Development Plan was adopted in 2014. A summary of the permissions is provided at Figure 4.5.

Figure 4.5 | Extant retail planning permissions 2014 to present

Ref	Site Address	Description	Status	Retail Floorpsace (sq m)
15103	Treacy's Homevalue Hardware, Kilkenny Road, Thomastown, Co. Kilkenny (out of centre)	For the development of two store units for commercial stock (450 sq m) and alterations to the existing commercial building, to include the demolition of the existing front porch, the construction of a new front porch and entrance (13 sq m), the alteration of the existing facade finish and signage, creation of 107 sq m of additional retail space within the existing building, the retention of the existing shed unit (38 sq m) and retention of the extension to retail and storage space (117 sq m)	Condition Permission Granted 22/05/2015	An additional 107 m sq comparison floorspace
15180	Kilkenny Street, Freshford, Co. Kilkenny	Demolition of existing motor services and the construction of a new petrol service and convenience store building.	Conditional Permission Granted 25/01/2016	167 sq m convenience floorspace

Ref	Site Address	Description	Status	Retail Floorpsace (sq m)
1527	Cillin Hill, Leggetsrath East, Dublin Road, Kilkenny	a. Single storey warehouse for agricultural related products. b. Agri-retail shop with ancillary offices and storage over-head in two storey block. c. Car parking areas, goods yards and set down areas. d. Free standing totem advertising pole sign and building mounted signage. e. All associated site development works and boundary treatments.	Conditional Permission Granted 12/06/2015	543 sq m comparison floorspace
15538	Centra Supermarket, Main Street, Mullinavat, Co. Kilkenny	The demolition of the adjoining dwelling house on the Southern side and for the construction and amalgamation of a new building consisting of Retail Area (151 sq m) and Stores Area (52 sq m) into the existing Supermarket at Ground floor level and First floor level (51 sq m) to the front of the new building and all associated signage and site works	Conditional Permission Granted 31/03/2016	151 sq m convenience floorspace
16286	Centra Supermarket Main Street, Urlingford Co. Kilkenny	Permission sought for; (1) the construction a single storey Extension on the Northern side of the existing Supermarket building, (2) Change of use from Stores to Retail area at the rear of the existing Supermarket, (3) Change of use of part of the Ground	Conditional Permission Granted 16/12/2016	260 sq m convenience floorspace

Ref	Site Address	Description	Status	Retail Floorpsace (sq m)
		floor of the existing AIB building (which is a Protected Structure) to Retail use and amalgamation of this area into the existing Supermarket building with associated signage, (4) Demolition of the existing northern boundary wall and the extension of the existing Car Park into rear of the AIB site and all associated site works at the Centra Supermarket, Main Street, Urlingford, Co. Kilkenny.		
16327	Cillin Hill Leggetsrath East Dublin Road Kilkenny	To construct a 2 storey commercial building with 3 no. agri-business retail units/showrooms at ground floor level with office accommodation at first floor level, building mounted signage, car parking areas, service yard and set down areas and associated site development works	Conditional Permission Granted 10/10/2016	866 sq m comparison floorspace

Ref	Site Address	Description	Status	Retail Floorpsace (sq m)
16369	Graiguenamanagh, Co. Kilkenny	For development at the former Cullen Steel Site. The development will consist of the demolition of the existing buildings on site with a floor area of 1,367 sq. metres and the construction of a single storey discount foodstore, to include off-licence use with a gross floor area of 1,608 sq. metres (net retail area of 1,140 sq. metres).	Conditional Permission Granted 15/02/2017	1,140 sq m convenience floorspace
17535	Former AutoBoland Garage, Newrath, Co. Kilkenny	For a Service Station with associated retail outlet with net retail area of 100sq.m.	Conditional Permission Granted 23/02/2018	100 sq m convenience floorspace
18328	Eurospar, The Square, Castlecomer, Co. Kilkenny R95 K038	For a single storey extension (134 sq m) to the existing Eurospar building and associated works	Conditional Permission Granted 13/02/2019	134 sq m convenience floorspace
1765	Units 9 and 10, Kilkenny Retail Park, Springhill	Amalgamation and construction of mezzanine floor.	Conditional Permission Granted 13/07/2017	650 sq m bulky goods floorspace

4.53 Based on the data collected in Figure 4.8, the approximate adjusted floorspace requirements are provided at Figure 4.6.

Figure 4.6 | Adjusted floorspace capacity based on delivered and extant planning permissions (sq m)

	Capacity as projected to 2020	Delivered or extant floorspace	Adjusted
Convenience	1,599	1,952	-353
Comparison	16,502	1,516	14,986
Bulky Goods	-4,391	650	-5,041

4.54 The outcome of this exercise is that while the County appears to have negative capacity for convenience and bulky goods floorspace, there is still reasonably substantial capacity for comparison goods floorspace. Here, we have identified that based on the capacity assessment that was undertaken for the previous Development Plan, there is still floorspace capacity remaining for new retail comparison floorspace at the current time. This floorspace should ideally be directed towards the opportunity sites where they are suited and appropriate for comparison goods, or other locations within core retail areas.

Out of Centre Retail

Retail Parks

4.55 Out of centre retailing is predominantly relevant to Kilkenny City, whereby there are a number of small out of centre retail locations. In addition, there is a large retail park on the outskirts and south of the city. The Kilkenny Retail Park is comprised of large units mostly for the sale of bulky goods. At the time of assessment , the following retailers were present:

- Woodies;
- Carpet Right;
- DD Electrical;
- Home Focus;
- Halfords;

- Sherwoods Electronics;
- Ken Black Toy and Nursery;
- Petmania;
- EZ Living;
- Harry Corry Interiors;
- Meubles Furniture Store.

4.56 There was also one vacant unit identified at the time of the Nexus site visits, and two supporting leisure services (Costa Coffee and KFC). The Hoban Hotel is also located on the western side of the complex.

4.57 At the time of assessment the car park at the Retail Park was well utilised and the stores are clearly popular. As there is limited opportunity for bulky goods retailing within the CRA or city centre, the expectation is that the Kilkenny Retail Park will continue to operate as the primary bulky goods retail destination in the County. Based on the negative capacity for bulky goods identified to 2020 in the previous Retail Strategy, we do not recommend the Council actively promote the development of additional out of centre bulky goods retail floorspace.

Local Centres

4.58 In addition to the retail park, there are a number of local neighbourhood centres located within the bounds of Kilkenny that provide a supporting role to the retail and services offer of Kilkenny City Centre. While these shops and services are important, their growth should continue to be carefully managed so as to ensure that they would not ever have the opportunity to compete with Kilkenny City Centre. Recommendations for development management in this regard are included in section 5.

4.59 The local centres within the bounds of Kilkenny include:

- Newpark Shopping Centre (19 units);
- Loughboy Shopping Centre (12 units);
- Waterford Road (11 units);
- Lidl on Johnswell Road;
- Aldi at Hebron Industrial Estate;

4.60 These local centre locations provide an important convenience goods offer and a limited range of services for local residents and should continue to be supported albeit given limited opportunity to expand.

4.61 Outside of Kilkenny City, there are some out of centre retail locations, particularly where stores such as Aldi and Lidl have come forward. For the most part these stores are located outside of the CRA in each centre, and are therefore likely to have had a direct impact on the vitality of those centres. For example, to the north of the CRA in Thomastown, there is a Lidl and a SuperValu and associated car parking. In combination with the relocation of the Post Office to this location, this development is very likely to have had a negative impact on the shops within the Thomastown CRA. We recommend utilising the sequential approach in the district towns in the future to avoid exacerbating this trend. This is picked up in more detail in section 5 of this report.

5.0 Recommendations and Policy Guidance

Introduction

5.1 This section of the Strategy contains key retail objectives to encourage and accommodate future retail and town centre development in Kilkenny County. It also sets out policies for the assessment of future retail and town centre proposals, in accordance with the overall aims of the Development Plan and the requirements of the 2012 Retail Planning Guidelines.

5.2 The Retail Planning Guidelines set out the following as the policy objectives that must guide each planning authority in addressing retail development issues:

- *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.*

5.3 The retail objectives and policies for Kilkenny City and County have been prepared with regard for the policy objectives as outlined in the Retail Planning Guidelines. The retail objectives and policies have also been prepared having undertaken consultation with Kilkenny's retailers. Retailers were given the opportunity to provide comments to assist in the preparation of the Strategy.

5.4 The remainder of this chapter sets out the headline issues facing the County from a retail and town centre perspective, a series of overarching retail objectives, and a suite of development management policies designed to deliver those objectives.

Headline Challenges

5.5 Based on the assessment of retail trends, the baseline assessment, discussion of retail strategy, feedback from town centre business, and discussions with Council Officers, the headline issues facing Kilkenny County's town centres have been identified as per the below.

a. Reducing the proportion of vacant units

While the proportion of vacant units in Kilkenny City is directly comparable to the Irish average, vacancies within the City Centre has been an issue identified by stakeholders and town centre business owners. A review of regional and national trends in this regard has established that the proportion of occupied units in Ireland's Town Centres have not been able to return to pre-recession levels. However, it is important to note that this is not an isolated issue facing Kilkenny County's centres, but an issue felt in town centres across Ireland and the UK. Notwithstanding, there are a number of key objectives and policies that can be included as a direct attempt to reduce the number of vacant units in Kilkenny, including:

(1) Prioritising retail development in Core Retail Areas, by strictly implementing the application of the Sequential Test;

(2) Implementing a policy that provides a requirement for a Retail Impact Assessment to be submitted for retail development over a certain threshold. The thresholds may vary for different parts of the County. For example in the area around Kilkenny, the threshold may be 1,000 sq m, while in the remainder of the County it might be 500 sq m. The Retail Impact Assessment shall at a minimum include the following:
    (i) Identification of catchment or study area;
    (ii) Estimation of expenditure available within the defined catchment or study area;
    (iii) Estimation of the turnover of existing centres within the catchment area which is likely to be affected by a new development;
    (iv) Estimation of the turnover of the new development for which a planning application is being lodged; and
    (v) Estimation of the quantum of consumer retail spending available in the catchment area which will be diverted from existing centres to the new retail development.

(3) Allowing flexibility in the type of uses permitted within Core Retail, in light of the ever changing nature of retail, and the requirement to adapt to changes in trends. While there are a range of uses permitted within the General Business Zone, it is important

that the community, businesses and other stakeholders recognise that having a diverse range of uses within Kilkenny City Centre will assist in ensuring the centre remains vital and viable.

(4) Promoting alternative uses such as office floorspace and residential development in Town Centres, to increase the population and therefore daily footfall. The council should continue to work proactively with developers to promote mixed use developments in Kilkenny City Centre with a residential aspect in addition to retail or leisure floorspace that contributes to the vitality and viability of the centre. .

(5) Identifying specific regeneration projects within the CRA's off the district towns, including for example exploring opportunities for niche shopping in certain locations such as Bridge Street in Callen, where rejuvenation of certain areas may act as a catalyst for further change.

b. <u>Working to improve accessibility</u>

The availability, cost and quality of car parking has continuously come up during discussions with stakeholders as a barrier for retail operators to operate their businesses successfully. Council owned and operated car parks currently generate revenue for the Council and is utilised on projects across the County. Whilst issues such as cost of car parking and the existing quantity of parking cannot be directly altered through retail policies, it is important that these issues continue to be monitored and managed by the Council as before.

In order to combat any potential future issues related to exacerbated car parking pressures due to retail development, planning policy can come into play. The Retail Planning Guidelines provide that where a new major retail development over a certain threshold is proposed that is likely to have an impact on highways, access and parking, a policy can be included that would trigger the requirement for a Transport and Traffic Assessment. This Assessment would have to demonstrate how the proposed development would remedy any predicted traffic issues caused by the proposal. The introduction of the City Bus service now offers additional opportunities for modal shift, which retail policy should reinforce.

Retail development should also consider how the development can be accessed by methods of active travel including walking and cycling, and public transport. Travelling by methods other than private car are increasingly becoming more popular in Kilkenny City, as shown in the results of the shopper survey, and therefore it is important that retail policy supports that modal shift.

c. <u>Enhancing the historic environment</u>

Kilkenny City is an attractive, historic centre, filled with character, and this has regularly been identified by shoppers and business owners as a draw card, helping to attract visitors to the Centre. It is therefore important that all future development within the City Centre is required to retain, complement and where possible enhance the important aspects of the historic environment. The Council has already made this a focus for Kilkenny City, through promotion of the Medieval Mile and its associated projects as a historic discovery trail through the centre of town. An important balance must be struck between creating a dynamic and commercially successful retailing environment and protecting the historic setting of the centre. Separately of the Retail Strategy, easily accessible guidance is required to assist shops owners with understanding the appropriate design of shopfronts, particularly in the historic core of the City[33].

d. <u>Taking advantage of Kilkenny's tourism potential</u>

Kilkenny City Centre welcomes thousands of tourists to the City Centre every year, and the industry is an important economic driver for the City and the wider County. It is important therefore that businesses are able to take advantage of the industry, particularly in relation to retailing in the historic core of the City Centre. Actions and policy interventions that support the synergies between the tourism and retail industries may assist businesses in tapping further into the tourism industry. Having adequate and high quality tourist and staff accommodation is, for example, and important aspect of a successful tourism offer. In the district towns, the key issue for the council to overcome is the high proportion of vacant units within each centre. On street surveys of the composition of the centres of each District Town identified a proportion of vacancy that was well above the Irish average. This high level of vacancy not only

[33] Kilkenny County Council has developed a revised shopfront guidance document in 2020

has a detrimental impact on the commercial success of the centres, but also on the public perception of each town. It is therefore important that retail policies are designed to support the ability for vacant units in the Core Retail Areas of each town centre to come back into use. Specific regeneration projects aimed at catalysing further rejuvenation may assist in reducing the quantum of vacant units within the CRAs of each District Town.

Retail Objectives

5.6 Having regard for the information presented in the earlier chapters of this Strategy, a series of retail objectives have been drafted. The primary purpose of these objectives is to inform the development of a suite of retail policies that will guide development in Kilkenny County's town centres. Following the objectives, a set of retail policies have been drafted.

5.7 The proposed retail objectives are outlined below:

(i) To ensure that Kilkenny County possesses a clear policy framework that can adequately meet the retail needs of the County's residents over the plan period, and that will inform the preparation and assessment of retail proposals;

(ii) To enhance and promote the vitality and viability of Kilkenny City Centre, and to support the centre's role as the dominant retail destination within the County;

(iii) Promote Kilkenny City Centre as a shopping destination that is competitive with other comparable shopping destinations in the South East of Ireland and further afield;

(iv) To sustain and enhance the vitality and viability of the four District Towns and their retail offer, and to support their continued growth in accordance with the Core Strategy;

(v) To ensure Kilkenny City Centre and the four District Town Centres are resilient to change in the context of the global economic climate;

(vi) To ensure a town centre first approach is adopted for all future retail development across the County, whereby the order of priority for the sequential approach will be City and Town Centre sites, edge-of-centre sites, and out-of-centre sites;

(vii) To promote flexibility mix of uses within the County's centres, and in particular, promote residential development on upper floors;

(viii) To encourage the reduction in vacant floorspace, taking into account suitability, obsolescence, and the identification of alternative uses that may be appropriate within the City and County

Towns. where possible, facilitate the regeneration and reuse of derelict buildings in appropriate location for town centre uses;

(ix) To improve the accessibility of each of the County's centres and promote all modes of transport;

(x) To appropriately manage car parking and accessibility for the short term, whilst also planning ahead to a future where private vehicle travel may not be the dominant form of transport;

(xi) To promote the development of high quality public realm through new development, and the enhancement of existing public realm throughout the County's centres;

(xii) Ensure all new development respects and enhances the historic environment;

(xiii) Enact a policy of town centre consolidation, by promoting the adaptive reuse of existing units as a priority ahead of developing sites for additional retail floorspace, unless there is a demonstrated need; and

(xiv) To ensure that public perception of Kilkenny City Centre and County remains positive, and that the synergies between tourism and retailing are taken advantage of.

(xv) A joint Retail Strategy shall be undertaken between Kilkenny County Council and Waterford City and County Council for the area covered by the Waterford Metropolitan Area Strategic Plan (MASP) in accordance with the retail guidelines and RSES.

5.8 The retail planning objectives provide an overarching guide for the future of retail and town centre development in the county's town centres, and in exceptional circumstances, other destinations within the County. In following these objectives, the goal of the Kilkenny City and County Retail Strategy 2021-2027, will be to encourage the growth of healthy, vibrant and resilient city and town centres.

Recommended Retail Policies

5.9 Having regard for the retail objectives outlined above, a set of retail policies have been drafted that are designed to deliver those objectives. In formulating and adhering to these policies, Kilkenny County Council will look to ensure that the development of all future retail floorspace is carried out in accordance with the requirements of the 2012 Retail Planning Guidelines. Similarly, any proposed future town centre development within Kilkenny City or the County Towns should be formed with due regard for the objectives and policies. As such all proposals for new commercial developments will have to demonstrate how they would contribute towards and support the achievement compact growth and revitalisation/rejuvenation of city or town centres as envisaged in NPO 3c, 4 and 6 of the National Planning Framework,

5.10 In addition, these policies, as part of the overall Kilkenny County Development Plan 2021-2027, can be seen to form a single integrated and coherent strategic policy framework, designed to ensure that all development within the County is carried out in keeping with the ideals of sustainable development.

5.11 The policies are included below:

- Policy 1: Plan-led approach
  All proposals for retail floorspace and town centre uses, must accord with the relevant requirements of the Retail Planning Guidelines for Planning Authorities 2012 and the Kilkenny County Retail Strategy 2020-2026.

- Policy 2: Retail hierarchy
  Development in the County's centres should be of a type, size and scale appropriate to the centre, having due regard for the retail hierarchy and the appropriate level of development at each tier. The appropriate level of level of development at each tier is defined at Figure 5.1.

Figure 5.1 | Summary of Appropriate Level of Retail Development

Tier	Settlement Type	County Towns	Appropriate Level of Retail Development
1	Cities	None at present	Major retail destination within the County, offering a wide variety of convenience and comparison goods along with an extensive offer of retail, financial and business, leisure services including arts and cultural facilities. Provides a range independent and specialist shops.

Tier	Settlement Type	County Towns	Appropriate Level of Retail Development
2	Large towns	Kilkenny City	Key shopping destination offering a variety of convenience and comparison goods, along with a range of retail and leisure services and some financial and business services.
3	Smaller towns and villages	Callan Castlecomer Graiguenamanagh Thomastown [Ferrybank][34]	Local shopping destination serving the surrounding hinterland with a limited offer of convenience and comparison goods, and retail and leisure services.
4	Smaller settlements and rural areas	Various	Limited retail offer generally comprising a local convenience store, public house, fuel filling station and post office.

- <u>Policy 3: Town centre vitality and viability</u>

  Within the Core Retail Areas in Kilkenny City and the District Towns, development proposals that will make a contribution to the vitality and viability of the town centre will be permitted.

  Residential development will be encouraged on the upper floors of town centre properties.

- <u>Policy 4: City/Town centre first</u>

  In addition to the sequential approach outlines in the Retail Planning Guidelines, Kilkenny County Council will adopt a City/Town centre first policy. Where the location of a proposed retail development is in an edge-of-centre or out-of-centre location, a sequential test must be applied in line with the Retail Planning Guidelines. The order of priority for the sequential approach is to locate retail development in Kilkenny City Centre CRA, the District Town Centre CRAs and village centres, and only to allow retail development in edge-of-centre or out-of-centre locations where all other options have been exhausted. The sequential test should be strictly applied and applicants will be required to consider altering their formats and

[34] The entry for Ferrybank is purely indicative as the centre partly sites within the Waterford CCC area and would need agreeing with Waterford CCC in due course.

considering smaller sites and multi-storey options. In accordance with RPO 151(f) and (g) of the Regional Spatial and Economic Strategy, adequacy of parking provision at non-residential sites will not be considered as a measure for site suitability in sequential tests.

Where retail development at an edge-of-centre site is being proposed, permission will only be granted where the applicant can demonstrate that there are no sites or potential sites including vacant units within the city/town/village centres that are (a) suitable (b) available and (c) viable, as defined at Paragraph 4.4.2 of the Retail Planning Guidelines.

Where no town centre or edge of centre sites are available, the Planning Authority must not approve development unless it is satisfied that there will be no negative impact on the viability or vitality of the city/town centre. Where retail development at an out-of-centre site is being proposed, the site will only be considered where the applicant can demonstrate that:

a) there are no sites or potential sites either within, or on the edge of, Kilkenny City Centre, the District Town Centres and village centres that are (a) suitable (b) available and (c) viable.; and
b) they would contribute towards and support the achievement of compact growth and revitalisation/rejuvenation of city or town centre as envisaged in objectives 3c, 4 and 6 of the National Planning Framework in order to allow a positive presumption in favour of the application under NPO 11 of the NPF.

- Policy 5: Retail Impact Assessment

  A Retail Impact Assessment will be required for development for development which features:

  a) Proposals of greater than 1,000 sq m of net floorspace in Kilkenny city, including extensions to existing units; or
  b) Proposals of greater than 500 sq m of net retail floorspace in all other settlements, including extensions to existing units.

As described at Paragraph 4.9 and Annexe 5 of the Retail Planning Guidelines, the Retail Impact Assessment shall at a minimum include the following:

(i) Identification of catchment or study area;

(ii) Estimation of expenditure available within the defined catchment or study area;

(iii) Estimation of the turnover of existing centres within the catchment area which is likely to be affected by a new development;

(iv) Estimation of the turnover of the new development for which a planning application is being lodged; and

(v) Estimation of the quantum of consumer retail spending available in the catchment area which will be diverted from existing centres to the new retail development.

In addition to the above, the Retail Impact Assessment shall demonstrate how the development proposal would contribute towards and support the achievement compact growth and revitalisation/rejuvenation of city or town centres as envisaged in objectives 3c, 4 and 6, 11 and 27 of the National Planning Framework.

- Policy 6: Kilkenny City Centre

  In order to ensure the retail function, profile and competitiveness of Kilkenny City is retained, applications for retail development and other town centre uses that will make a contribution to retaining Kilkenny's role as the dominant retail destination within the County will be supported.

  Retail development and other main town centre uses should be prioritised to be located within Kilkenny's Core Retail Area to ensure the vitality and viability of the historic core is protected and promoted. Similarly, it is of great importance to ensure that the historic character of the Core Retail Area is protected. An important balance must be struck between creating a dynamic and commercially successful retailing environment and an attractive historic setting. Proposals that incorporate improvements to the City's laneways will be supported by the Council, particularly where involving creative solutions designed to activate redundant spaces.

- Policy 7: Town centre accessibility

  Improvements to the accessibility of each of the centres will be supported. In particular, proposals that include developing a pedestrian and cyclist friendly environment, and/or improve safety and limit traffic congestion will be prioritised. Wherever possible, development that encourages a shift towards sustainable modes of transport will be encouraged.

- Policy 8: High quality public realm

  Development proposals that incorporate improvements to high quality public realm within town centres, and particularly within the Core Retail Areas, shall be supported by the council.

- Policy 9: Historic environment;

  Development within each of the centres should be designed to respect and enhance the character of the historic environment. Proposals that would be detract from the character of the centre will not be permitted.

- Policy 10: Amalgamation of units

  The Council may accept proposals for the amalgamation of two or more units within a centre where the applicant can demonstrate:

  a) There is no alternative vacant unit of an appropriate size and location for the proposal ; and

  b) The proposal would not detract from the overall vitality and viability of the centre; and

  c) Where relevant, the proposal has been designed using appropriate conservation principles and expertise to adapt an historic building, thereby retaining the building in use and maintaining the essential character of the streetscape.

- Policy 11: Traffic and Transport Assessment

  Applications for retail development proposals for more than 1,000 sq m net floorspace shall be required to submit a Traffic and Transport Assessment (TTA). As required by the Retail Planning Guidelines, the TTA must examine the transport impacts of a proposed development, incorporating any subsequent measures necessary to ensure roads and junctions and other transport infrastructure, including car parks, in the vicinity of the development are adequate to accommodate the proposed development without causing additional delays or issues to existing and future road based traffic. Most importantly, a TTA will be required to demonstrate how to encourage a shift towards sustainable travel modes by those using the retail development in question.

- <u>Policy 12: Tourism, Markets and Events</u>

  Development proposals within the County's centres that seek to improve the tourism offer will be supported. Tourism proposals should contribute to improving a positive public perception. Proposals that form a link between tourism and the offer of the town centre will be looked upon favourably by the Council. Similarly, markets and public events that are expected to have a positive influence on public perception of a centre will be supported.

  Within Kilkenny City Centre, proposals that would make a positive contribution to the function of the Medieval Mile will be supported.

- <u>Policy 13: Retail Parks</u>

  No further retail parks will be granted permission in and around Kilkenny City and Environs over the period of the next City and County Development Plan.

- <u>Policy 14 The Abbey Quarter</u>

  The Abbey Quarter lands, the subject of the masterplan, will be the focus for city centre expansion (including convenience and comparison retailing) in the City & Environs over the plan period and City Centre expansion shall take place in phased approach. The following phasing of development lands within the City & Environs is proposed:

  - Phase 1: Abbey Quarter lands the subject of the masterplan and, at an appropriate scale, MacDonagh Junction;
  - Phase 2: The former mart site at the Castlecomer Road.

  The release of phase 2 lands for major retailing will only be considered where the local authority is satisfied that planning permission is granted, and/or significant expansion has already occurred on the phase 1 lands and that any additional retailing on the phase 2 lands will not have a negative impact on the vitality or viability of the retail core or other centre. It is considered that the definition of major retail expansion for the purposes of this section of the City & Environs is 1,000 sq m for convenience goods and 2,000 sq m for comparison goods.

Delivery, Monitoring and Review

5.12 The Retail Planning Guidelines advise that planning authorities should monitor trends in their areas, and update retail policies as and when required. As the retail sector is one of the most dynamic sectors in the economy, it is important to recognise that the issues and faced and current trends can change over time. This has been exacerbated by the recent COVID-19 pandemic. The Council shall therefore continue to regularly monitor the contents of this strategy to ensure that:

a. The Retail Strategy and its baseline data are kept up to date;
b. Mechanisms are in place to monitor the progress of the strategy; and
c. The Council can intervene in a positive and timely manner to address changing circumstances in its centres, as necessary.

5.13 To assist with monitoring, Table 5.2 sets out how each objective can be delivered through the policies proposed.

Table 5.2 | Objective and Policy Monitoring

Objective	Policies
(i) To ensure that Kilkenny County possesses a clear policy framework that can adequately meet the retail needs of the County's residents over the plan period, and will inform the preparation and assessment of retail proposals;	P1 P2 P3 P4 P5 P6 P7 P8 P9 P10 P11 P12 P13 P14 P15

Objective		Policies
(ii)	To enhance and promote the vitality and viability of Kilkenny City Centre, and to support the centre's role as the dominant retail destination within the County;	P2 P3 P4 P5 P6 P12
(iii)	Promote Kilkenny City Centre as a shopping destination that is competitive with other comparable shopping destinations in the South East of Ireland and further afield;	P2 P3 P4 P5 P6 P12 P13
(iv)	To sustain and enhance the vitality and viability of the four District Towns and their retail offer, and to support their continued growth in accordance with the Core Strategy;	P2 P3 P4
(v)	To ensure Kilkenny City Centre and the four District Town Centres are resilient to change in the context of the global economic climate;	P1 P2 P3 P13 P14
(vi)	To ensure a town centre first approach is adopted for all future retail development across the County, whereby the order of priority for the sequential approach will be City and Town Centre sites, edge-of-centre sites, and out-of-centre sites;	P4
(vii)	To promote flexibility mix of uses within the County's centres, and in particular, promote residential development on upper floors;	P3

Objective	Policies
(viii) To encourage the reduction in vacant floorspace, taking into account suitability, obsolescence, and the identification of alternative uses that may be appropriate within the City and County Towns. Facilitate the regeneration and reuse of derelict buildings in appropriate location for town centre uses	P4 P6
(ix) To improve the accessibility of each of the County's centres and promote all modes of transport. This shall include management measures for access by car, public transport, walking and cycling;	P7 P8 P11
(x) To appropriately manage car parking for the short term, whilst also planning ahead to a future where private vehicle travel may not be the dominant form of transport;	P7 P11
(xi) To promote the development of high quality public realm through new development, and the enhancement of existing public realm throughout the County's centres;	P8
(xii) Ensure all new development respects and enhances the historic environment;	P9
(xiii) Enact a policy of town centre consolidation, by promoting the adaptive reuse of existing units as a priority ahead of developing sites for additional retail floorspace, unless there is a demonstrated need;	P4 P5 P6 P10
(xiv) To ensure that public perception of Kilkenny City Centre and County remains positive, and that the synergies between tourism and retailing are taken advantage of;	P12
(xv) A joint Retail Strategy shall be undertaken between Kilkenny County Council and Waterford City and County Council for the area covered by the Waterford Metropolitan Area Strategic Plan (MASP) in accordance with the retail guidelines and RSES;	

Glossary of Terms

Bulky 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. Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage or display.

Source: Retail Planning Guidelines 2012

Capacity: Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace

Centre: A centre refers to a city or town centre and can also, refer to the centre of a district or neighbourhood centre which has been identified in the settlement hierarchy of a development plan.

Source: Retail Planning Guidelines 2012

Comparison Goods: 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 goods.

Source: Retail Planning Guidelines 2012

Convenience Goods: Food; alcoholic and non-alcoholic beverages; tobacco; non-durable household items

Source: Retail Planning Guidelines 2012

Core Retail Area: Defined area where retail development is concentrated within a town centre

Edge-of-Centre: For retail purposes, a location that is well connected and up to 300 metres from the CRAs. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances.

Experian Goad: Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK and Ireland.

Financial & Business Services: An Experian Goad category comprising the likes of banks, building societies, employment agencies, legal services, estate agents and business services.

Source: Experian Goad

Gross Retail Floorspace: The total floorspace, as measured from inside the shop • walls, which includes sales space, plus storage space, offices, toilets, canteen, and circulation space.

Source: Retail Planning Guidelines 2012

Independent Retailers: Retailers with less than 10 outlets/ stores

Source: Experian

Leisure Services: An Experian Goad category for town centre leisure units which includes bars, cafes, cinemas, nightclubs, take-aways, hotels, public houses and restaurants. For clarity, it does not include facilities for leisure pursuits e.g. sports centres, swimming pools or health & fitness clubs.

Source: Experian Goad

Main Town Centre Uses:	Retail development; leisure, entertainment facilities, the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture, tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities); and residential
National Multiple:	Defined as retailers with ten or more stores/ outlets *Source: Experian*
Net Retail Floorspace:	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 *Source: Retail Planning Guidelines 2012*
Retail Floorspace:	Refer to definition of either Shopping Centre Floorspace, Gross Retail Floorspace, or Net retail Floorspace.) *Source: Retail Planning Guidelines 2012*
Retail Impact:	The potential effects of proposed retail development upon existing shops *Source: Planning Portal*
Retail Services:	An Experian Goad category comprising the likes of dry cleaners, health & beauty, opticians, photo processing, post offices and travel agents. *Source: Experian Goad*

Shopping Centre Floorspace: Internal space (measured from inside walls) of • a covered shopping centre including circulation space toilets, lifts and escalators gross retail area, gross non-retail area floorspace devoted to incidental activities such as foodcourt, administrative offices, walkways, car parking both integrated and surface

Source: Retail Planning Guidelines 2012

Special Forms of Trading: Special forms of trading (SFT) are defined as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies

Source: Experian

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