VOL **8**

Retail Strategy

Wexford County

Development Plan

2022 - 2028

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1.0 Introduction and National, Regional and Local Policy Context

1.1 Function of the Wexford Retail Strategy

This retail strategy has been prepared by KPMG Future Analytics on behalf of Wexford County Council in accordance with provisions set out in National and Regional Policy and in the 'Retail Planning Guidelines for Planning Authorities' published by the Department of the Environment, Heritage and Local Government (DoEHLG) in 2012.

The overriding aim of the strategy is to create the appropriate conditions necessary to foster a healthy and vibrant retail environment in County Wexford over the Development Plan period of 2021-2027 and beyond with recommendations to help improve the retail environment and enhance the vitality and effectively manage and support change. It does so through retail policy recommendations which are framed in the context of national and regional plans, strategies and guidelines. The strategy provides important information on the quantum, scale and types of retail development required over the period to 2027, with further outlook to 2030 and beyond. It is important to note that in 2019 the Municipal boundary lines within the County were revised and a fifth Municipal District (Rosslare) was added. However, the shopper, household and online retail surveys (Section 3) that were conducted to inform this strategy were completed prior to 2019 when County Wexford was divided into four Municipal District's (Enniscorthy, Gorey, New Ross and Wexford). Therefore, for the purposes of this strategy all analysis is based on four municipal districts with Wexford and Rosslare considered as one Municipal District.

1.2 Key Outputs and Structure of the Strategy

The key outputs of this retail strategy are as follows:

- i Analysis of national and regional retail policy and national and regional retail trends.
- ii Analysis of the change that has occurred in retailing in County Wexford since the last Strategy.
- iii Household surveys, shopper surveys, online surveys and pedestrian counts.

iv An analysis of current shopping patterns in the county.

v Town 'health checks' including recommendations with regard to improving the health, vitality and viability

vi Identify the main components of the regional Retail Hierarchy.

vii Identify the main components of the Retail Hierarchy of the county including district centres if any within the four main towns where appropriate.

viii Identify the level and form of retailing activity appropriate to all the components of the Retail Hierarchy and also any district centres if applicable within the four larger towns.

ix Define, by way of a map, the boundaries of the core retail areas of the four main towns and also the location of any district centres if applicable.

x Prepare a quantitative assessment of the requirement for additional retail floorspace (square metres) on a catchment basis for each of the four main towns.

xi Provide strategic guidance on the location and scale of retail development to support the retail hierarchy (town centre and district centre, villages, rural areas).

xii Identify opportunity sites in each of the four main towns which could be used to suit the variety of required retail formats including requirements for large floor plate and modern retail format.

xiii Development Management criteria tailored for each of the four main towns having regard to the findings above where appropriate.

xiv Appropriate development plan policies/objectives necessary for ensuring vital and vibrant town and village centres.

The following overall structure of this Retail Strategy is summarised below:

Table 1.1: Structure of Retail Strategy Document

Section 1.0	Introduction and National, Regional and Local Policy Context
Section 2.0	Current Retail Trends
Section 3.0	Shopper, Household and Online Retail Surveys
Section 4.0	Town Centre Health Checks
Section 5.0	Projected Retail Floorspace Requirements
Section 6.0	Retail Planning Policies and Criteria for Assessment

1.3 National, Regional and Local Policy Context

The aim of this section is to provide an outline summary of the main policy documents that will shape the development of the Wexford Retail Strategy. It is necessary to have consideration to development trends already established via overarching regional and national strategies, and to incorporate them into this policy document.

This ensures that a balanced and comprehensive approach is taken to retail development in Wexford, taking into consideration external influences and other economic sectors. The following are some of the key policy documents to be reviewed that are relevant to the development of a Retail Strategy for Wexford:

Table 1.2: National, Regional and Local Policy Context

National	- National Planning Framework – Project Ireland 2040 Our Plan - Retail Planning Guidelines (2012) - Retail Design Manual 2012 - Framework for Town Centre Renewal 2017 - Realising Our Rural Potential, Action Plan for Rural Development - Future Jobs Ireland 2019
Regional	- Southern Region Spatial and Economic Strategy 2020 - South-East Action Plan for Jobs 2015-2017 - Retail Strategies of adjoining Local Authorities

Local	- Wexford Corporate Plan 2019-2024 - Wexford Town and Environs Development Plan 2009-2015 (as extended) - Enniscorthy Town and environs Development Plan 2008-2014 (as extended) - Gorey Local Area Plan 2017-2023 - New Ross Town & Environs Development Plan 2011-2017 (as extended) - Templeshannon Regeneration Strategy 2018 - Wexford Local Economic and Community Plan 2016 - 2021- - Courtown and Riverchapel Local Area Plan 2015 (as extended) - Clonroche Local Area Plan 2009-2015 (as extended) - Taghmon Local Area Plan 2009-2015 (as extended)

This Retail Strategy and along with the County Development Plan 2021-2027 has consideration for the existing retail strategies within the above-referenced Wexford Town, Enniscorthy Town, New Ross Town and Gorey Town Development Plans, however it will sit above all of the local town plans, taking precedent in terms of policy weighting. The retail-related provisions in the above-referenced local town plans and the successor local area plans must therefore be read together with the County Development Plan 2019-2025 and this Retail Strategy.

1.4 National Policy Context

The following section outlines the primary National policy that guides retail planning in Ireland. It includes the over-arching State plans and strategies as well as retail-specific guidelines. Analysis of the implications for County Wexford of these policies is included.

1.4.1 National Planning Framework – Ireland 2040 Our Plan

The National Planning Framework (NPF) is a high-level strategy that will shape Ireland’s growth and development up to the year 2040. Drawing upon lessons learned from the implementation of the National Spatial Strategy 2002-2022, the NPF calls for a shift from an uncoordinated “business as usual” approach to planning and provides a framework for the sustainable development of Ireland’s existing settlements.

In terms of Ireland’s future population, the NPF sets out a population target for the Southern Region of 340,000-380,000 additional people i.e. a population of almost 2 million by 2040. It is projected that around 225,000 additional jobs i.e. at least 880,000 in total will be required to sustain this level of population growth.

National Policy Objective 7 calls for the strengthening of all levels of Ireland’s urban structure, with a particular focus on the five city regions (Dublin, Limerick, Cork, Galway and Waterford), large towns (>10,000 population), and small towns (<10,000 population).

While the NPF identifies the scope that exists for all large towns in Ireland, detailed growth targets for these towns are set out in the Regional Spatial and Economic Strategies (RSESs).

1.4.2 Realising Our Rural Potential, Action Plan for Rural Development

The Action Plan for Rural Development was published in November 2018 with the primary aim of unlocking the potential of rural Ireland through a framework of supports at national and local level. It seeks to ensure that those who live in rural areas have increased opportunities for employment locally, access to public services and social networks that support a high quality of life.

It recognises the varying typologies of rural areas and that each can have different needs, requiring different solutions depending on their local assets, their peripherality and population density. However, it is also acknowledged that there are common issues affecting rural parts of Ireland throughout the country and as such provides a range of policy interventions to help support communities in rural Ireland.

1.4.3 Retail Planning Guidelines (2012) and Retail Design Manual (2012)

The third iteration of the *Retail Planning Guidelines* were published in 2012 by the Department of the Environment, Community and Local Government and accompanied by the *Retail Design Manual* (2012).

The guidelines provide a framework for regional and local authorities in preparation of policies and County Development Plans, to allow planning authorities assess planning applications, and to assist developers and retailers in formulating development proposals.

The guidelines outline five key policy objectives as follows;

- Ensure retail development is plan-led;
- Promotion of city/town centre vitality through a sequential approach to planning;
- Secure competitiveness in retail sector through the enabling of quality development in suitable locations;
- Facilitate the shift towards easier access to retail via public transport, cycling and walking; and
- Delivering quality urban design.

One of the key tools to enable the above objectives is the requirement for the preparation of County Retail Strategies to inform the County Development Plan by prescribing levels and form of additional retail floorspace and identifying a retail hierarchy. Through this the guidelines state that applications for retail development are to be in line with the role and function of the settlements identified in the retail hierarchy.

Any proposal should also accord with the scale and type of retail development identified in the retail strategy to support the vitality and viability of these settlements. A presumption against large out-of-town retail centres is further identified. Retail Impact and Traffic Impact Assessments are also required to accompany planning applications ensuring any potential impact on existing retail and in particular the vibrancy and vitality of the town centre is avoided.

The guidelines state that planning applications should be assessed using the 'Sequential Test'. The overall preferred location for new retail development is within city and town centres. Retail development may also be appropriate within District Centres identified in the settlement hierarchy at a scale appropriate to the needs of the area.

Only where the applicant can demonstrate and the planning authority is satisfied, that there are no sites or potential sites within a city, town centre or designated district centre should an edge-of-centre site be considered.

In addition, only in exceptional circumstances where it can be demonstrated that there are no sites or potential sites available either within the centre or on the edge of these centres should an out-of-centre site be considered.

With regard to classification of location for retail development the 2012 Retail Planning Guidelines provides clear guidance as follows:

> ***Retail Area***
> That part of a town centre which is primarily devoted to shopping.
>
> ***Centre***
> For the purposes of these guidelines, 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.
>
> ***Edge-of-Centre***
> A location within easy walking distance of the primary retail area of a city town centre or district centre. This distance should generally not exceed 300-400 metres. The appearance and perceived safety of the connection to edge-of-centre retail and the strength of attraction is also of relevance.

Out-of-Centre

A location that is clearly separate from a town centre but within the town development boundary, as indicated in a development plan or local area plan.

The Retail Planning Guidelines also provide a classification of the types of retail goods categories, convenience and comparison. Annex 1 defines each category as follows:

❖ Convenience

This category includes all supermarkets, smaller convenience stores and retail food outlets (excluding fast food takeaways, restaurants and cafes) serving food, alcoholic and non-alcoholic beverages, tobacco and non-durable household goods.

❖ Comparison

The list of goods which fall under this category is as follows: 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 and bulky goods.

❖ Comparison (Bulky)

While the bulky goods category is listed under the classification of comparison floorspace above, it is considered appropriate to make a distinction within the Retail Study between pure comparison floorspace and floorspace used for the sale of bulky goods.

The Annex 1 definition includes a (non-exhaustive) list of goods which are considered to fall within the bulky goods category as follows: Goods generally sold from retail warehouses where DIY goods or goods such as flat pack furniture are of such a size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that a large area would be required to display them e.g. repair and maintenance materials, furniture and furnishings, carpets and other floor coverings, household appliances, tools and equipment for the house and garden, bulky nursery furniture and equipment including perambulators, bulky pet products such as kennels and aquariums, audio visual, photographic and information processing equipment, catalogue shops and other bulky durables for recreation and leisure.

With regard to the retailing and settlement hierarchy, the Retail Planning Guidelines advocate for the sustainable organisation of retail activity in Ireland to reflect the existing national settlement structure. Taking account of historical patterns, in addition to preceding retail planning policies, the retail hierarchy should reflect the broad tiers of urban development recognising that such a system of classification is indicative only, with scope for overlap between the specific retail functions provided in each tier.

The importance of quality urban design is acknowledged in the Retail Planning Guidelines (2012). This is underlined further with the accompanying document, the *Retail Design Manual* (2012) which sets out key principles of urban design which might form the framework for policies to promote quality design in development plans and local area plans. *The Design Manual for Urban Roads and Streets* (2013) provides additional design guidance for public spaces, seeking to achieve integrated street design within urban areas that is influenced by the type of place in which the street is located, and balance the needs of all users. For retail development in County Wexford, given the historic street patterns and built form of the county's main towns, design is a key consideration and one which has and will continue to influence the success or otherwise of planning applications for retail developments. Integration with the existing street pattern and built form is therefore central to the ongoing vitality and viability of retail centres.

1.4.4 Framework for Town Centre Renewal (2017)

The Framework for Town Centre Renewal prepared for the Retail Consultation Forum and published in April 2017 sets out an Action Plan for Town Centre Renewal. The Retail Consultation Forum was established in May 2014 under the Action Plan for Jobs 2014 to provide a platform for structured engagement between the retail sector and relevant

Government Departments. The forum is made up of a range of retail sector representatives and industry chief executives as well as public bodies including representatives from all relevant Government Departments.

The Framework for Town Centre Renewal is intended as a blueprint for towns and villages to guide their stakeholders (community organisations, businesses, residents, local authority, public agencies etc.) through the key stages of town centre renewal, including carrying out a town centre health check, preparing a Town Centre Plan, nominating a local business champion, adopting a place making strategy, ensuring strong occupancy and a pleasant visual appearance.

Other elements including securing financial supports for projects, optimising the potential for artisan food and craft supports, adopting a programme of events and promoting via online platforms to reach a wide audience including tourists. The above health checks and town centre plans would be community-driven initiatives, which aim to mobilise groups within towns to formulate their vision and action plan.

Health Checks and Town Plans may draw heavily on the content of County Retail Strategies; however, their focus would be wider than retail alone, and would examine all the stakeholders and influencing factors for town centres. Figure 1.1 below identifies the numerous health check indicators outlined in the Framework for Town Centre Renewal:

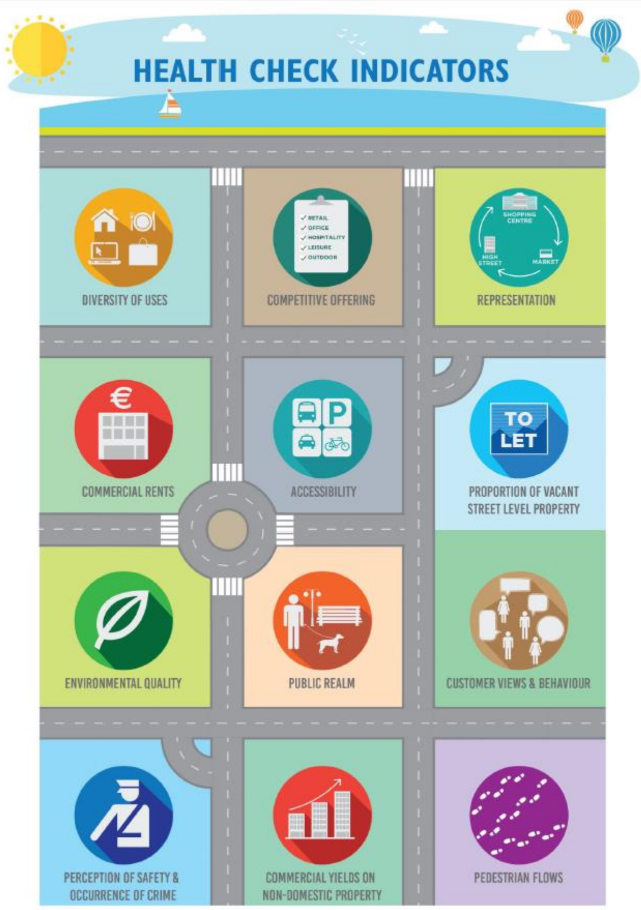

Figure 1.1: Health Check Indicators (Framework for Town Centre Renewal, DBEI 2017)

1.4.5 Rural Regeneration and Development Fund

As part of Project Ireland 2040, the Government has committed to providing an additional €1 billion for a new Rural Regeneration and Development Fund ("the Fund") over the period 2019 to 2027. The Fund will provide investment to support rural renewal for suitable projects in towns and villages with a population of less than 10,000, and outlying areas. It will be administered by the Department of Rural and Community Development.

The new Fund provides an unprecedented opportunity to support the revitalisation of rural Ireland, to make a significant and sustainable impact on rural communities, and to address de-population in small rural towns, villages and rural areas. It will be a key instrument to support the objectives of the National Planning Framework, and in particular to achieve Strengthened Rural Economies and Communities - one of the National Strategic Outcomes of the NPF. Initial funding of €315 million is being allocated to the Fund on a phased basis over the period 2019 to 2022.

1.4.6 Urban Regeneration and Development Fund

The Urban Regeneration and Development Fund (URDF) has been established to support more compact and sustainable development, through the regeneration and rejuvenation of Ireland's five cities and other large towns, in line with the objectives of the National Planning Framework and National Development Plan. Through the scheme €2 billion worth of funding has been made available up to 2027, with €130 million available for 2020 and €550 million available up to 2022.

Larger towns with a population of more than 10,000 people and a number of smaller towns with fewer than 10,000 people are eligible to apply for funding. In this regard Wexford Town and Enniscorthy fall into the category of larger towns while Gorey and New Ross could also qualify for URDF funding as smaller towns as well as being eligible for RRDF funding. However, while Gorey and New Ross are eligible to secure funding under both the URDF and RRDF, permission is only given for funding under one of the schemes.

Types of projects eligible for funding include, but are not limited to the acquisition, enabling and/or development of areas, sites and buildings, relocation of uses, public amenity works, community facilities, and infrastructure related to housing, economic or skills development (including enterprise and tourism), transport, services infrastructure and/or transition to a low carbon and climate resilient society, in an urban context.

Bid proposals must be co-funded and will require a minimum 25% stakeholder contribution. Bids must also demonstrate a further requirement for 100% (euro-for-euro) leveraging of committed wider private sector investment (i.e. development) arising from fund expenditure.

1.5 Regional Policy Context

The following section outlines the regional policies, which guide retail planning in Ireland. It includes the over-arching regional plans and strategies as well as setting the regional settlement hierarchy including a classification of settlement in County Wexford. Analysis is included of the implications of these policies for retail planning in County Wexford.

1.5.1 Regional Spatial and Economic Strategy for the Southern Region

The Regional Spatial and Economic Strategy for the Southern Region was adopted on 31st January 2020. The RSES is a high-level document with the overarching aim of supporting the implementation of the NPF. It provides a strategic framework through which the policies and objectives of the NPF are delivered over a twelve-year period. As such, it will address spatial and economic issues around population growth, housing, employment, industrial and commercial development, retail development and the identification of regional strengths and opportunities for growth.

The RSES promotes a co-ordinated, co-operative and collaborative approach between each of the Cities and Key Towns within the region through the establishment of Metropolitan Area Strategic Plans (MASPs) for Cork, Limerick-Shannon and Waterford Metropolitan Areas and the identification of several Key Towns. Wexford town and Gorey town are identified as Key Towns along the Eastern Economic Corridor with the RSES stating the function of Key Towns as self-sustaining regional drivers and have a comparable structure to the five regional growth centres identified in the NPF.

Wexford is identified as a *"Regional Centre for Education, Retail, Health and public services"* with Regional Policy Objective 16 supporting industrial, commercial and residential development and the maintenance and development of its public infrastructure and education services.

RPO 16 Wexford

a) To strengthen the role of Wexford as a strategic location, a self-sustaining regional economic driver and Key Town on the Eastern Corridor. The RSES seeks to leverage its strategic location and accessibility to Rosslare Europort and to build upon its inherent strengths including digital connectivity, skills, innovation and enterprise, tourism, culture and retail services.

b) To develop supporting industrial, commercial infrastructure and residential development in Wexford Town for the Port function at Rosslare Europort.

c) To strengthen 'steady state' investment in existing rail infrastructure and seek investment for improved infrastructure and services including increased line speeds to ensure its continued renewal and maintenance to high level in order to provide quality levels of safety, service, accessibility and connectivity including improved frequency and journey times;

d) To support development of additional capacity at Rosslare Europort and provision of freight rail services and facilities to support sustainable increases in port operations;

e) Support development of the Wexford Campus as part of the Multi-Campus TUSE is as a key driver for the economic and social development in the town with a focus on educational attainment and lifelong learning;

f) To support the delivery of the infrastructural requirements identified for Wexford subject to the outcome of the planning process and environmental assessments;

g) To improve the Public Realm and attractiveness of the Town Centre through urban regeneration of key locations;

h) Transport measures through a Local Transport Plan including retention and expansion of the town bus network, improvements to cycling and walking infrastructure and rural transport services into the town.

Gorey is also identified as a Key Town within the RSES, noted as being a strategically located urban centre along the Eastern Economic Corridor with accessibility and significant influence in a sub-regional context. Gorey's strong vibrant town centre with renowned fashion retail, food and cultural services are noted as being key attributes of the town: *"It is an important and thriving urban centre providing a range of services to the residents of the town and the* *wider rural hinterland including primary and post primary education, health care, retail, and employment, cultural and recreational facilities."*

RPO 25 Gorey

a) To strengthen the role of Gorey Town as an economic driver, leveraging its strategic location and accessibility to Rosslare Europort / proposed connection to Dublin -Belfast Eastern Economic Corridor (port, rail and road), build upon its inherent strengths including digital connectivity, skills, innovation and enterprise, tourism, culture and retail services.

b) To encourage and facilitate strategic employment development to allow Gorey Town to become more self-sufficient in terms of employment including development of opportunity sites and property solutions.

c) To strengthen 'steady state' investment in existing rail infrastructure and seek investment for improved infrastructure and services to ensure its continued renewal and maintenance to high level in order to provide quality levels of safety, service, accessibility and connectivity;

To strengthen 'steady state' investment in existing rail infrastructure

d) To seek investment in sustainable transport measures through a Local Transport Plan to include a public transport hub/inter-change, new road bridges over the railway line (at Ballytegan and at Ramstown/ Knockmullen) and improved pedestrian and cycling infrastructure.

e) To improve the public realm and attractiveness of the Town Centre as a place to live, work and visit through key urban regeneration projects / environmental improvement schemes;

f) To support the delivery of the infrastructural (including education, amenity, social and cultural) requirements identified for Gorey to keep pace with population growth.

g) To support the delivery of the infrastructural requirements identified for Gorey subject to the outcome of the planning process and environmental assessments.

1.5.2 County Wicklow Retail Strategy 2016-2022

County Wicklow bounds County Wexford to the North, separating it from Dublin City. The current retail strategy for County Wicklow features in Chapter 6 of the Wicklow County Development Plan 2016-2022. In terms of implications for County Wexford, it outlines a key strategic objective to address leakage to other counties as follows:

To reduce leakage of expenditure from County Wicklow to other counties, through a significant expansion in the amount and range of comparison floorspace within the County, which will provide for a significant amount of the comparison shopping needs of existing and future residents up to 2031.

Arklow is the closest large town to County Wexford and its success as a retail centre has implications for County Wexford and in particular Gorey as its northern-most centre. Arklow is identified as a Level 3, Tier 1 town 'serving a wide district'. It is apparent that some leakage in expenditure occurs from southern County Wicklow to Gorey, as outlined in the Arklow town profile as follows:

Arklow is the main centre located in the south of the County, removed from other large centres. The centre provides for the service needs of its residents and a large geographical catchment extending to Avoca, Aughrim, Redcross, a significant rural population, and to some extent to Tinahely/Shillelagh/Carnew area (although some expenditure is lost from these centres to Gorey and Carlow).

Notwithstanding this recognition of expenditure leakage, Arklow is allocated only 4,000-5,000m2 of net comparison retail floorspace to 2031 in the County Wicklow - a significantly lower allocation than Bray, Wicklow-Rathnew and Greystones. The strategy states that this allocation of comparison floorspace 'reflects the fact that the town is relatively well provided for with c. 19,000m^2 of existing comparison space'.

1.5.3 Carlow County Retail Strategy 2015-2021

The Carlow County Retail Strategy 2015-2021 outlines the shopping preferences of a sample of its inhabitants, 1% of which stated a preference to shop in Bunclody for convenience shopping, however this is attributed to the Supervalu store, which is in fact located within the Co Carlow administrative boundary.

For comparison shopping, 1% of survey respondents stated a preference to travel to Gorey for their main clothing/ footwear shopping while 2.5% stated a preference to shop in Gorey for their bulky goods shopping. The survey also asked County Carlow shoppers how often they travelled to competing centres, to which 40% replied that they visited Gorey once per month, while 40% stated they visited Gorey once or twice per year. That Gorey features in the shopping preferences of County Carlow residents, represents a validation of Gorey as a regional shopping destination given the relative distance that Gorey is from the County Carlow border.

The strategy allocated the vast majority (80%) of the additional comparison floorspace to Carlow Town, being the only Level 1 Town Centre in the County. The remaining 20% of additional comparison retail floorspace (including bulky and non-bulky) is allocated to the remainder of the county, including Tullow (identified as Level 2 Sub County Town) and Ballon (identified as a Level 3 Town), which are relatively close to the County Wexford Border. For additional convenience floorspace, the strategy allocated 49% to Carlow Town and 51% to the remaining settlements in the county.

1.5.4 Waterford City Retail Strategy 2012-2018

The Waterford City Retail Strategy 2012-2018 outlines through its shopper survey that almost 17% of County Waterford residents surveyed indicated that they shop in Wexford. It also revealed that 6% of the County Waterford residents surveyed carried out their main clothes and footwear shopping in Wexford. The strategy comments on Wexford Town as a competing centre as follows:

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

It is noted in the strategy's assessment of the retail catchment areas for Waterford City, that Wexford Town is outside the 60-minute drivetime isochrone, however New Ross and Wellingtonbridge are within the 30-minute drivetime isochrone for Waterford City.

The quantum of additional retail floorspace required for Waterford City to 2022 is given as requiring 5,647m2 of additional convenience floorspace, 33,685m2 of additional comparison floorspace and -4,401 bulky goods floorspace.

1.5.5 Kilkenny Retail Strategy 2014-2020

The County Kilkenny retail strategy covers the period 2014 to2020 outlining retail requirements throughout the plan period. Through this, capacity estimations are set out which act as broad guidance as to the potential additional quantum of convenience and comparison floorspace required.

While not determining the exact direction of expenditure outflows from County Kilkenny, the strategy does identify the amount of leakage across the three retail types. As such leakage in 2014 was determined to be 29% for convenience, 31.6% for comparison and 9.3 for bulky goods. Through this analysis the following key objectives of the Kilkenny Retail Strategy 2014-2020 were developed

"4Q To improve convenience market share retained within the county to 80% post 2020

4R To improve comparison market share retained within the county to 75% post 2020

4S To increase convenience trade draw from 8% to 15% post 2020"

The quantum of additional retail floorspace calculated for County Kilkenny covering the 2014-2020 plan period is further identified as 1,599m2 of additional convenience floorspace, 16,502m2 of additional comparison floorspace and -4,391m2 bulky goods floorspace by 2020.

1.6 Local Policy Context

The following section outlines the primary local policy that guides retail planning for Wexford. It includes a brief analysis of the current Local Area Plans of the four main towns and their environs as they relate to retail. Furthermore, a review of the Wexford Local Economic and Community Plan 2016-2021 is also provided.

It is important to note that when adopted the Wexford County Development Plan 2021-2027 will supersede each of the existing Local Area Plans and that the preparation of any new Local Area Plans will be required to be in accordance with the County Development Plan which will act as the parent document for such plans. New Local Area Plans will also need to be cognisant and respond to the strategic requirements and principles of the RSES for the southern region.

1.6.1 Wexford Local Economic and Community Plan 2016-2021

The Wexford Local Economic and Community Plan 2016-2021 sets out six high level goals that inform the county's economic and community development and are intended to improve the quality of life and well-being of communities and for citizens in Wexford. The performance of the retail sector is an important contributor to High Level Goal 3 '*Continue to develop and promote County Wexford as a great place to live, work and visit*'. In this regard, Priority 1: '*To Support the Rejuvenation of Village and Town Centres*' of Sustainable Economic Development Objective 3.3 – '*Making the Living Environment More Attractive*' is relevant. This includes a specific objective to implement the policies and objectives of the Retail Strategy contained in the County Development Plan 2013-2019. A measurable action set out in support of this is to '*Make town centres an attractive location for shoppers and businesses alike*' with footfall in town centres and vacancy levels set out as indicators of success.

Moreover, having regard for the Retail Planning Guidelines (2012) and the Retail Design Manual (2012), noting the importance they place on promoting high quality urban design as contributor to the vibrancy and attractiveness of town centres, the following specific objective was developed as part of the Wexford Local Economic and Community Plan; to incorporate '*urban design advice and urban design frameworks in all LAPs to ensure that place making and neighbourhood planning are at the heart of development*'.

1.6.2 Wexford Town and Environs Development Plan 2009-2015 (as extended)

The plan seeks to ensure that there is an efficient, equitable and sustainable spatial distribution of retail provision within the town. It outlines recommendations to address leakage of retail expenditure from the town and its catchment area by strengthening the range and quality of its retail offer. This is to be facilitated through clear principles and guidance on where various forms of new retail floorspace would be acceptable. To provide guidance to applicants and developers it also sets out the criteria for the assessment of retail development proposals within the town.

1.6.3 Enniscorthy Town and Environs Development Plan 2008-2014 (as extended)

The Enniscorthy Town Plan provides advice regarding the quantum, scale and type of retail development required with the town. It considers these matters in detail and provides appropriate policies and actions regarding future retail development in Enniscorthy accordingly. It acknowledges the need to reinforce the existing retail hierarchy of County Wexford, having particular regard to existing town and village centre, highlighting the need for Enniscorthy town centre to continue to develop and enhance its retail function to meet the shopping needs of its residents to ensure it remains competitive.

1.6.4 New Ross Town and Environs Development Plan 2011-2017 (as extended)

The retail policies contained within the plan seek to ensure that the majority of retail development is within New Ross town centre and that the areas designated as primary retail and opportunity sites be retained as key locations for this retail development. It notes that such new retail development in neighbourhood centres shall be primarily for convenience goods with suitable comparison goods open for consideration to provide for the day to day shopping needs of the local community. It further seeks to prioritise the reuse of vacant and derelict buildings in the town centre for town centre appropriate uses including retail development.

1.6.5 Gorey Town & Environs Local Area Plan 2017-2023

The Gorey Plan recognises the strength of its exiting retail offering and its particularly healthy relationship with independent retailers, including high-end boutiques. It acknowledges that this helps to contribute to the vitality and sense of vibrancy within Gorey town and the subsequent benefits this bring to other retail types in the area. Six key retail objectives are included within the Gorey Plan which seek to promote and protect this vitality within the town centre, restrict development outside of the retail core, retain the function of ground floors on the Primary retail streets and ensure the scale of retail development is commensurate with the neighbourhood it is intended to serve.

1.7 Retail Hierarchy

The Retail Planning Guidelines (2012) identify six broad tiers of retail hierarchical order, including; Metropolitan (the five large cities), Regional, Sub-Regional, District Centres, Small Towns and Rural Areas and Local Shopping. They acknowledge that the hierarchy cannot be considered in an overly prescriptive manner and that there are no clearly defined cut-off points between levels of the hierarchy.

In the context of the national hierarchy Wexford Town is identified as a Regional town, while Enniscorthy and New Ross are identified as Sub-Regional towns. Gorey is not specifically referenced within the guidelines, however, its designation as a Key Town under the RSES, its relatively rapid expansion in terms of population growth and its retail offering, underline how it provides an important sub-regional retailing function and therefore should be considered in this manner accordingly.

The purpose of the retail hierarchy is to indicate the level and form of retailing activity appropriate to the various urban centres of the county to enable the Council to protect each centre's overall vitality and viability whilst allowing each centre to perform its overall function within the county's settlement hierarchy. Having regard to the revised County Wexford settlement hierarchy as published within the Core Strategy 2021-2027, the retail hierarchy has been adopted for inclusion in this strategy to inform the direction of retail scale and type in the county. The County Wexford Retail Hierarchy 2021-2027 is set out in Table 1.3 below:

Table 1.3: The Retail Hierarchy

Retail Planning Guidelines Settlement Type	Wexford Core Strategy Hierarchy	Retail Settlements	Appropriate Scale and Type of Retail
Level 1: Regional Town	Key Town	Wexford Town	Major Convenience and Comparison
Level 2: Large Sub-Regional Towns	Key Town	Gorey Town	Large to Medium scale convenience and medium scale comparison
Level 2: Large Sub-Regional Towns	Large Town	Enniscorthy Town / New Ross Town	Large to Medium scale convenience and medium scale comparison
Level 3: Small Service Towns	Service Settlements	Bunclody, Castlebridge, Courtown and Riverchapel, Ferns, Rosslare Harbour and Kilrane, Rosslare Strand,	Medium scale convenience along with small to medium scale comparison including tourism related comparison
	Strategic Settlements	Bridgetown, Campile, Clonroche, Coolgreany, Kilmuckridge, Kilmore Quay, Taghmon and Wellingtonbridge	Medium scale convenience along with small to medium scale comparison including tourism related comparison
Level 4: Local Shopping or Neighbourhood Centres	Various Villages and Rural Settlements		Predominantly lower order convenience, but not excluding tourism related comparison

Wexford Town is the primary retail centre in the County fulfilling its regional role as identified in the Retail Planning Guidelines. To establish the amount of retail floorspace within the four main towns of the County, an extensive survey was carried out in December 2019 and January 2020. From this assessment it was determined that Wexford Town had 59,946m2 of net retail floorspace, accounting for 42% of the overall floorspace in the four main towns.

This large provision of floorspace, coupled with the diverse range and quantum of both comparison and convenience goods on offer, and not equalled elsewhere within the county has informed the conclusion that Wexford Town is identified in the retail hierarchy as the only Level 1 settlement.

The towns of Enniscorthy, New Ross and Gorey are located in Level 2 of the retail hierarchy which accommodates Large Sub-Regional towns. Enniscorthy and New Ross are referred to as a sub-regional tier settlement's in the Retail Planning Guidelines national retail hierarchy. Enniscorthy has 11% of the net retail floorspace of the four towns with a net retail floorspace of 16,407m2. New Ross has 22% of the overall retail floorspace within the four main towns which accounts for 31,177m2, with the largest offering bulky goods retail floorspace in the County (35% of the total County Bulky goods provision).

As previously discussed, Gorey is not specifically referred to in the national retail hierarchy however, it has experienced a sustained period of growth in both population and retail expansion since the publication of the guidelines. As such it now accounts for 25% (36,098m2) of the retail floorspace across the four main towns, second only to Wexford Town.

This expansion coupled with the town's strategic location and potential to accommodate further economic growth have resulted in Gorey being identified in the RSES as a Key Town and also in the County Wexford 2021-2027 settlement hierarchy as a Level 1 Key Town along with Wexford Town. However, it is not equal to Wexford town in terms of quantum of retail floorspace and diversity of offering and as such is included in Level 2 of the retail hierarchy accordingly.

To sustain the vitality and viability of the core retail areas of the Level 1 and 2 settlements, and to ensure the position of each town as the predominant locations for retail in the County are retained over the period of the Wexford Development Plan 2021-2027, it has been determined that it is not appropriate to add any District Centres to the retail hierarchy. This is to ensure that the focus is placed on enhancing the retail provision, convenience and comparison offerings within the four main towns.

The towns of Bunclody, Rosslare Harbour and Kilrane, Courtown and Riverchapel, Castlebridge, Rosslare Strand, are identified as Level 3 'Service Settlements' within the retail hierarchy having earned their position as they have populations in excess of 1,500 persons in accordance with the Retail Planning Guidelines.

Ferns, Bridgetown, Campile, Clonroche, Coolgreany, Kilmuckridge, Kilmore Quay, Ferns, Taghmon and Wellingtonbridge have been added to this level of the hierarchy as a result of their projected growth in population over the period of the development plan, and or as a result of the crucial role they play in servicing a broad catchment of rural settlements.

Each of the towns has a small supermarket, alongside a level of comparison shopping. Villages and rural settlements are the final tier in the retail hierarchy.

Their main function is to serve localised residential areas. They include small shops usually associated with petrol filling stations and post offices. They play an important role in local communities particularly in the more rural and remote parts of the County.

2.0 Current Retail Trends

This chapter provides an assessment of the current retail performance and trends, allowing for the consideration of national context as well as local conditions as they relate to the retail sector (comparison, convenience and bulky goods) in County Wexford. It also provides some analysis of the retail sector in County Wexford, its performance since the previous strategy in 2013, the factors influencing its performance, and the most up to date retail trends affecting the county. It is useful to examine some of the key performance indicators since the previous retail strategy in order to understand how the county's retail sector has changed over the development plan period.

The County's previous Retail Strategy 2013-2019 was prepared during a time when the national retail market was experiencing a significant decline due to the recession and national economic downturn. The retail market had been showing signs of improvement, with marked increases in the volume of recorded sales, however uncertainty in all market sectors remains against a backdrop of geo-political events as discussed below and a sustained period of 'price conscious shopping', a well-established feature of the Irish retail sector with County Wexford no exception. In addition, vacancy rates remain a cause for concern and the phenomenon of online shopping is a feature that continues to be apparent in the retail market.

Despite market uncertainty in recent years, the retail sector continued to be one of the primary drivers of the economy in Ireland and is unique in its geographic spread, having a presence in almost all settlements across Ireland. The CSO recorded in 2017 that the sector employs approximately 276,000 in the provision of retail services. This is approximately 25,000 more employees than the combined number of employees in construction, agriculture, forestry and fishing[1]. As the economic recovery strengthened, the level of

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[1] CSO, Key Short-Term Indicators

employment in retail services increased steadily year-on-year since 2010 when it accounted for approximately 265,000 employees.

However, as the worst effects of the economic recession of 2007 appeared to have abated for many sectors, the outbreak of the coronavirus (COVID-19) has brought new challenges leaving the global economy facing an uncertain future.

As a result of the necessary public health measures needed to curtail the spread of COVID-19, the Irish economic landscape has substantially changed from being one of the fastest growing economies in the European Union.

As per the latest estimates from the Department of Finance[2], the Irish economy is now projected to decline by 10.5 per cent this year and unemployment is expected to rise to 22 per cent by the second quarter of 2020. While it is clear that the Covid-19 outbreak will have a significant impact on Ireland's economy in the short term, at the time of writing the degree to which this impact will be felt across Ireland's regions, counties, cities and towns over a prolonged period remains to be seen[3].

2.1 Retail Sales

Pre-COVID 19, a period of steady economic growth benefitted the retail sector with the Retail Sales Index[4] showing growth of sales in the sector of 32.2% since 2012.[5] The CSO have reported an increase in domestic retail sales since 2012 (see Figure 2.1 below).

[2] https://www.gov.ie/en/news/d2ec5b-minister-donohoe-publishes-stability-programme-update-2020/
[3] Regional Assemblies: COVID 19 Regional Economic Analysis, May 2020
[4] A monthly measurement of all goods sold by retailers based on a sampling of retail stores of different types and sizes. The retail sales index is often taken as an indicator of consumer confidence.
[5] Savills, Market in Minutes, Quarter 4 2016

While this is a positive indicator for the sector, it must be tempered by caution as the retail sector is highly sensitive to consumer sentiment, which is increasingly influenced by global economic shifts and geopolitics. Consumer sentiment affects not only the volume of sales but the financial value of those sales.

The economic recovery as it relates to the retail sector has been characterised since the economic recession by the 'price conscious shopper'. This is evidenced by a proliferation in discount stores particularly in the convenience sector, but also in the comparison sector.

This trend has benefitted the consumer with intense competition placing downward pressure on prices. For vendors, it means that despite an upward trend in volumes of sales in recent years, these increases have not translated into an increase in the value of sales.

The CSO's Retail Sales Index (December 2019) shows that seasonally adjusted, the volume of retail sales (excluding motors) increased by 5.6% since December 2018. The retail sector which witnessed the most growth in terms of volume of sales over the annual period between December 2018 and 2019 was the housing equipment sector i.e. Bulky Goods, for example furniture, electrical goods and DIY (Savills, Market in Minutes, December 2017).

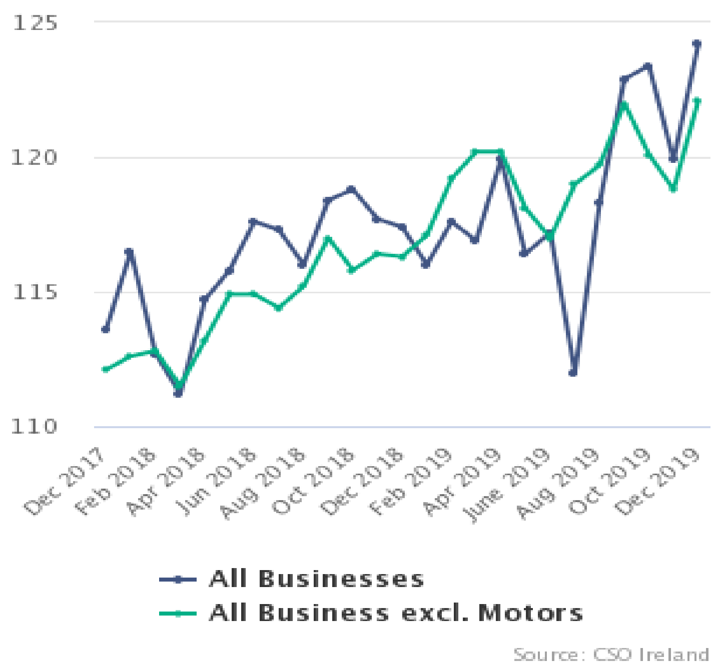


Figure 2.1. Retails Sales Index December 2017 and December 2019 (Source CSO)

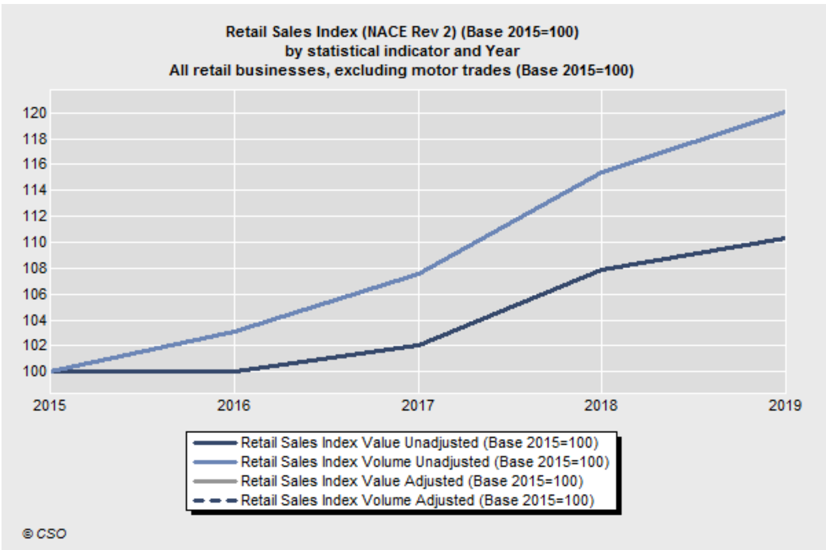


Figure 2.2 Retail Sales Index (Value and Volume) 2015-2019 (Source CSO)

Having regard to the Consumer Prices Index, prices on average increased by 1.3% between December 2018 to December 2019. One of the main factors contributing to the annual change was due to higher prices for alcoholic drinks and food consumed in licensed premises like restaurants, cafes and hotels. This period also witnessed a decrease in pricing in the housing equipment sector (i.e. Bulky Goods, for example furniture, electrical goods and DIY) which partially explains the increase in the Retail Sales Index of this sector as discussed previously.

Figure 2.3 Consumer Price Index 2015-2019 (Source CSO)

In May 2019, Retail Ireland, a representative body for Irish retailers published its monthly Retail Ireland Monitor. Therein, it outlined the how retail sales patterns in Ireland increasingly imitate geopolitical trends. Upon investigation it is claimed that direct correlations between political uncertainty attached to global events such Brexit aid to a growing cautiousness amongst Irish consumers, attributing this partially to the age of information and instantaneous news delivery. Therefore, Irish consumers continue to search and shop on the basis of discounted prices and widescale promotional activity, and against that backdrop retail prices have continued to fall. This view was echoed in the KBC Irish Consumer Sentiment blog6 in December 2019 where it is stated that at "current levels, the sentiment index is still pointing to a nervous Irish consumer". In its February 2020 edition, it did however report a six-month high in its Consumer Sentiment Index informed mainly by a reduced risk of a 'crash out' Brexit and an annual usual start of the year optimism boost sentiment.

These underlying consumer concerns have both positive and negative impacts in terms of the spatial impact of these effects in County Wexford and across the State. The trend toward 'price conscious shopping' has led to increased trip distances to large outlet stores, typically for comparison or bulky goods shopping. While increasing trip-distances is commonplace for comparison goods shopping, 'price-conscious' shopping has had the opposite effect for convenience goods, with a proliferation of discount multiples stores now locating in smaller urban centres throughout rural parts of Ireland, thus resulting in shorter trip distances.

[6] https://www.kbc.ie/blog/consumer-sentiment-surveys/brexit-delay-eases-irish-consumer-concerns-and-sug

2.2 Geo-political impacts

As touched upon above, Ireland's overall economic health is increasingly subject to external forces during a protracted period of geo-political uncertainty as a result of the COVID-19 pandemic. Moreover, Brexit and other associated risks such as a weakening of consumer confidence and the fall in value of Sterling will have already impacted the sector. Other challenges facing retailers with a physical presence in Ireland include a growing cost base linked to increasing insurance and Government mandated wage rates.

Thus, the ever-changing retail market and sensitivity to consumer sentiment places more importance on well-considered retail planning to recognise and respond to geo-political trends, for example expediting land use provision where necessary, while protecting the values associated with communities and places including placing an emphasis on customer service, staff training, diversification, development and online trading.

2.3 Online shopping

Online shopping, or 'e-commerce' has a major presence in the Irish retail market, with most multiples having a significant online presence. E-commerce Europe estimates that 84% of Ireland's population of 15 years and older use the internet, with 71% of this population shopping online, with Irish e-commerce sales reaching €7.7 billion in 2019[7].

Visa's Irish Consumer Spending Index has recorded sales in all payment types since 2014. In August 2019, the Visa Index showed a 2.5% year on year increase in ecommerce spending. A survey undertaken by the European Consumer Centre (ECC) Ireland in November 2017[8] revealed that over 73% of Irish consumers surveyed in Ireland have shopped online in the past 12 months. The 18 to 24 age group were the biggest online shoppers (92%), followed

[7] https://www.ecommerce-europe.eu/research-figure/ireland/
[8] https://www.eccireland.ie/ecc-ireland-survey-73-consumers-shopped-online-44-not-confident-about-rights/

by the 45 to 53 age group (87.14%), the 35 to 44 age group (82.61%), the 25 to 34 age group (78.95%), the 55 to 64 age group (67.14%) and finally the 65 plus (46.30%).

The 2017 Irish Total Retail Survey published by PWC Ireland shows that a quarter (25%) of Irish respondents shop online at least once a week and 30% of consumers expect to use their mobile phone as their main shopping tool in the future[9].

The Retail Ireland Monitor published in February 2019[10] further reported that Christmas 2018 marked an important watershed from a digital retail perspective with retailers across all sectors reporting strong growth in online sales, with it being the strongest performing retail mechanism for the majority of retailers.

Online shopping is therefore one of the most significant growth areas in the retail market in the past decade. While this represents an opportunity for retailers as an additional sales platform, many traditional retailers have suffered loss of sales and in this way, online sales or ‘e-commerce’ represents a significant competitor.

In recognition of this, many retailers are adapting by co-locating leisure uses (particularly food and beverage) alongside retail to provide an ‘experience’ that cannot be replicated in an online setting.

On the main street where floorplates are generally not large, leisure uses such as restaurants and cafes have tended to replace vacant former retail units. While online shopping is a major factor in loss of sales, there is an opportunity for town centres to

[9] https://www.pwc.ie/publications/2017/ten-retailer-investments-for-an-uncertain-future-total-retail-survey.pdf
[10] https://www.retailireland.ie/Sectors/RI/RI.nsf/vPages/Services_and_Information~Research_-and-_Data~retail-ireland-monitor---issue-17---february-2019-12-02-2019/$file/Q4+2018+Retail+Monitor.pdf

provide something that is not possible online - a marketplace where experience and social interaction is possible.

The PWC Total Retail Survey referred to above showed that in-store shopping remains very important and is still the most popular way to shop in Ireland with at least 40% of Irish respondents shopping in store at least once a week.

However, the results also indicate that improvements are required in face to face customer services and product knowledge so that face to face shopping retains its position in the retail market, a critical requirement for healthy towns and villages.

2.4 Change in Retail Floorspace Provision

An analysis of the change that has occurred in retail floorspace provision across the four main towns in County Wexford since the 2013 Retail Strategy is included in Table 2.1 below. From this it can be seen that there has been a 4% overall reduction in the quantum of occupied retail floorspace across the four towns of Wexford Town, Enniscorthy, Gorey and New Ross. The most significant change across the retail types relates to Bulky Goods which has experienced an 18% reduction in floorspace across the four towns, with Wexford Town accounting for the biggest reduction in this retail type.

Convenience retail has increased by 13% with Gorey accounting for the largest quantum of growth in convenience retail with a 64.5% increase on its 2013 provision. Enniscorthy has witnessed the most dramatic change with a 25% reduction in retail provision across all retail types, underpinned by a 34% reduction in comparison retail floorspace. Gorey has experienced the greatest overall uplift in floorspace, increasing from 33,134m2 in 2013 to 36,098m2 in 2020 (+9%).

New Ross has also benefitted from a 6.5% increase in retail provision, with a significant increase in its comparison offering from 5,012m2 to 10,700m2, however its provision of convenience retail has reduced by some 25%. Wexford as the main retail hub and County town has seen an 8% reduction in total retail floorspace, mainly influenced by a 34% reduction in the bulky goods offering. Its convenience offering has increased by 19% while there has been a limited 5.5% reduction in comparison floorspace.

Table 2.1: Change in Retail Floorspace between 2013 and 2020

	Bulky Goods			**Comparison**		
Town	2013	2020	Change	2013	2020	Change
Wexford Town	18,348	11,967	-34%	33,160	31,331	-5.5%
Gorey	9,318	9,464	+1.5%	14,008	10,491	-25%
New Ross	14,586	13,214	-9.5%	5,012	10,700	+113%
Enniscorthy	3,909	3,145	-19.5%	9,920	6,514	-34%
Total	46,161	37,789	-18%	62,100	59,035	-5%
	Convenience			**Total Retail Floorspace**		
Town	2013	2020	Change	2013	2020	Change
Wexford Town	13,945	16,648	+19%	65,454	59,946	-8%
Gorey	9,807	16,143	+64.5%	33,134	36,098	+9%
New Ross	9,669	7,263	-25%	29,268	31,177	+6.5%
Enniscorthy	8,010	6,749	-16%	21,839	16,407	-25%
Total	41,431	46,802	+13%	149,695	143,625	-4%

2.5 Competing Centres

Retail is a highly competitive sector and Wexford's location relative to national transport linkages is a core consideration in this regard. The road network comprising four National Primary Routes, the N30, N25, N80 and N11 and the M11 Motorway encompassing the Enniscorthy and Gorey bypass all serve to ensure that the County is highly connected via its road networks.

This has been furthered with the recent opening of the N25 New Ross Bypass which links the existing N25 at Glenmore to the R733 via a new River Barrow Bridge. This high-quality road network is coupled with the presence of a rail network that connects Dublin to Rosslare Europort with stops in Gorey, Enniscorthy, Wexford Town and Rosslare Strand to facilitate the ease of movement across the county and with constant opportunities for both the inflow and outflow of retail custom.

For settlements in the north of the County in particular, the presence of these infrastructural links, which have undergone significant upgrades in the last decade (including the M11 and N30 bypasses) has made the urban centres of the Greater Dublin Area much more accessible than was previously the case.

It is now possible to travel between Gorey and Dublin City Centre in 77 minutes by car and 90 minutes by train (Pearse Station), while the travel times from Wexford to retail centres such as the Dundrum Shopping Centre by car can be as little as 57 minutes (in the case of Gorey). In the south of the County, Waterford City can be reached in 22 minutes from New Ross.

A summary table of the various distances and travel times between the main urban centres of Wexford and those which they compete with is presented overleaf in Table 2.2. Please note however, that the assessment was conducted before the official opening of the N25 New Ross Bypass and the M11 Motorway upgrade.

Table 2.2 Drive times and Distances of Competing Centres

From	Wexford Town		Enniscorthy		New Ross		Gorey	
To	Time (m)	Distance (km)	Time (m)	Distance (km)	Time (m)	Distance (km)	Time (m)	Distance (km)
Wexford Town	-	-	21	22	30	35	41	42
Enniscorthy	21	22	-	-	26	31	28	29
New Ross	30	35	26	31	-	-	55	58
Gorey	41	42	28	29	55	58	-	-
Waterford City	50	57	50	54	22	22	78	81
Carlow	66	72	50	52	52	55	57	57
Arklow	59	61	40	47	68	77	17	17
Kilkenny City	71	74	65	57	42	41	72	86
Bray	84	111	68	97	95	127	47	67
Dundrum Shopping Centre	92	124	78	112	104	142	57	82
Dublin City Centre	114	130	101	118	125	146	77	87

3.0 Shopper, Household and Online Retail Surveys

The following chapter summarises the surveys carried out as part of this strategy which were carried out prior to the suspension of the legislative timeframes for the preparation of the County Development Plan (to allow for alignment with RSES).

The householder telephone surveys were carried in December 2017 and January 2018. On-street shopper surveys took place across the four main towns – Wexford, Enniscorthy, New Ross and Gorey in January and May 2018. The online survey was made available for respondents to complete between June and July 2018.

It is important to note that all surveys were conducted prior to 2019 when County Wexford was divided into 4 MD's (Enniscorthy, Gorey, New Ross and Wexford). In 2019 the Municipal boundary lines within the County were revised and a 5th MD (Rosslare) was added.

3.1 Methodology

A total of 1,778 surveys were conducted, with 500 shopper (on-street) surveys, 502 household (telephone) surveys and 776 online surveys carried out across the county.

The surveys contained similar questions relating to where the respondents carry out their main food and grocery shopping, top-up shopping, comparison shopping (clothes and shoes) and bulky goods (large household appliances and furniture) shopping.

The surveys also contained questions regarding the respondents' satisfaction with the location they were shopping in along with the frequency of these types of shopping including online shopping.

3.1.1 Shopper Surveys Methodology

The locations and allocations of shopper (on-street) surveys were chosen based on a proportional calculation of the population of each of the four towns.

Only Level 2 and above settlement types (from the Retail Hierarchy) were chosen for shopper surveys given the concentration of retail outlets and pedestrian footfall in these settlements.

Table 3.1: Survey numbers - On Street Shopper Surveys

Survey Breakdown	Wexford MD	New Ross MD	Enniscorthy MD	Gorey MD
2016 Population	45,428	32,025	35,613	36,656
No. On-Street Surveys	204	82	115	99
% of Population of each MD	0.4%	0.3%	0.3%	0.3%

3.1.2 Household Surveys Methodology

The locations and number of household (telephone) surveys undertaken were allocated in proportion to the population of each Municipal District (MD). Telephone surveys were carried out by using the Eir's online phone book (with random sampling).

3.1.3 Online Survey Methodology

The online survey was intended to supplement the previous shopper and household surveys in order to strengthen response rates for questions and some of the cohorts. The questions were designed for parity with the household telephone survey. Questions were implemented using survey monkey and distributed using the Wexford County Council MapAlert Text and email Alert system. The survey was accessible from 22/06/2018 to 5/07/2018.

3.2 Shopper Survey Results

The purpose of the shopper surveys was to provide insights on the shopping behaviour of people using the four towns. The number of responses per question varies as in some cases the respondent did not wish to answer a particular question(s). Notwithstanding this, it is considered that the results are statistically robust as the response rate was very high.

3.2.1 Characteristics of Respondents

A random sampling method was adopted with interviewers instructed to approach the next person passing following completion of the previous survey. This ensures a random mix of male and female respondents.

The age ranges of respondents are set out in Table 3.2 below. The highest proportion of the public surveyed identified as falling within the 15-24 age cohort category, following by the 55-64 age cohort, representing 20.8% and 16.1% respectively of total respondents.

Table 3.2 Age Range of Respondents

Age Group	Number	%
15-24	103	20.8%
25-34	73	14.7%
35-44	50	10.1%
45-54	76	15.3%
55-64	80	16.1%
64-74	73	14.7%
75 +	41	8.3%
Total	496	100.0%

Respondents who are residents of County Wexford

Of the 500 respondents surveyed, 448 (90%) of respondents surveyed were residents of County Wexford with 49 respondents identified as non-resident (10%).

Table 3.3 Question: Are you resident?

Are you a resident of County Wexford?		
Location of Survey	Resident of County Wexford	Non-Resident
Gorey	83	15
New Ross	70	12
Wexford	182	20
Enniscorthy	113	2
Total	448 (90%)	49 (10%)

The locations of residence for those who did not list the survey origin as the place in which they live included the following:

- **Gorey:** Wicklow, Enniscorthy, Arklow, Ballygarrett, Inch, Courtown, County Dublin and New Ross

- **Enniscorthy:** Ferns, Bunclody, Oulart and Gorey.
- **New Ross:** County Kilkenny and Campile
- **Wexford:** Rosslare, Kilrane, County Dublin, Castlebridge, New Ross, County Wicklow, Enniscorthy

Non-residents connection to the area

Of the non-resident visitors to the four towns, 17% of visitors were there as tourists or as a trip out, with 15% were there for 'other' reasons, with 13% visiting Women's clothing stores. 13% were conducting their main weekly grocery shop with a further 10% were availing of financial or banking services or doping other grocery shopping.

Table 3.4 Non-residents connection to the area

What is the main reason for your visit to the town centre today?						
Reason	Enniscorthy MD	Gorey MD	New Ross MD	Wexford Town MD	Total	Total%
Accessories		1			1	2%
Bank/Financial Services		2	3		5	10%
Browsing		2		2	4	8%
Clothes - women	1	2		3	6	13%
Eating		1	1	2	4	8%
Hair/beauty				1	1	2%
Main weekly shop		2	3	1	6	13%
No particular reason			1		1	2%
Other	1	3		3	7	15%
Other grocery shopping			3	2	5	10%
Tourist/trip		2	1	5	8	17%
Total	2	15	12	19	48	
Total%	4%	31%	25%	40%		

3.2.2 Purpose of trip

As a collective, the primary reason cited by respondents for visiting the four towns was to undertake the 'main weekly grocery shop' (29%) followed by 'other grocery shopping' (17%) as secondary reason. People also visited the towns for banking, financial services, for clothes shopping (women's clothes) and for a range of 'other reasons' which were not stated. This is summarised below in Table 3.5.

Table 3.5 Purpose of trip (residents)

What is the main reason for your visit to the town centre today?						
Reason	Enniscorthy MD	Gorey MD	New Ross MD	Wexford Town MD	Total	Total%
Accessories	1	1	-	-	2	0%
Bank/Financial Services	3	5	14	9	31	7%
Browsing	8	3	4	14	29	6%
Clothes - children	1	-	-	1	2	0%
Clothes - men	1	4	-	8	13	3%
Clothes - women	3	2	1	23	29	6%
DIY/Electrical goods	-	-	-	3	3	1%
Drinking	-	2	1	1	4	1%
Eating	5	5	2	7	19	4%
Footwear	2	-	-	1	3	1%
Furnishing/Household	-	4	-	2	6	1%
Hair/beauty	4	3	1	1	9	2%
Main weekly grocery shop	45	20	16	49	130	29%
No particular reason	2	-	7	3	12	3%
Other	17	14	3	27	61	14%
Other grocery shopping	15	18	17	24	74	17%
Toiletries/Chemist	-	2	3	3	8	2%
Tourist/trip	-	-	-	1	1	0%
No Response	6	-	1	5	12	3%
Total	113	83	70	182	448	
Total%	25%	19%	16%	41%		

3.2.3 Mode of Transport, Journey Time and Frequency of Visits

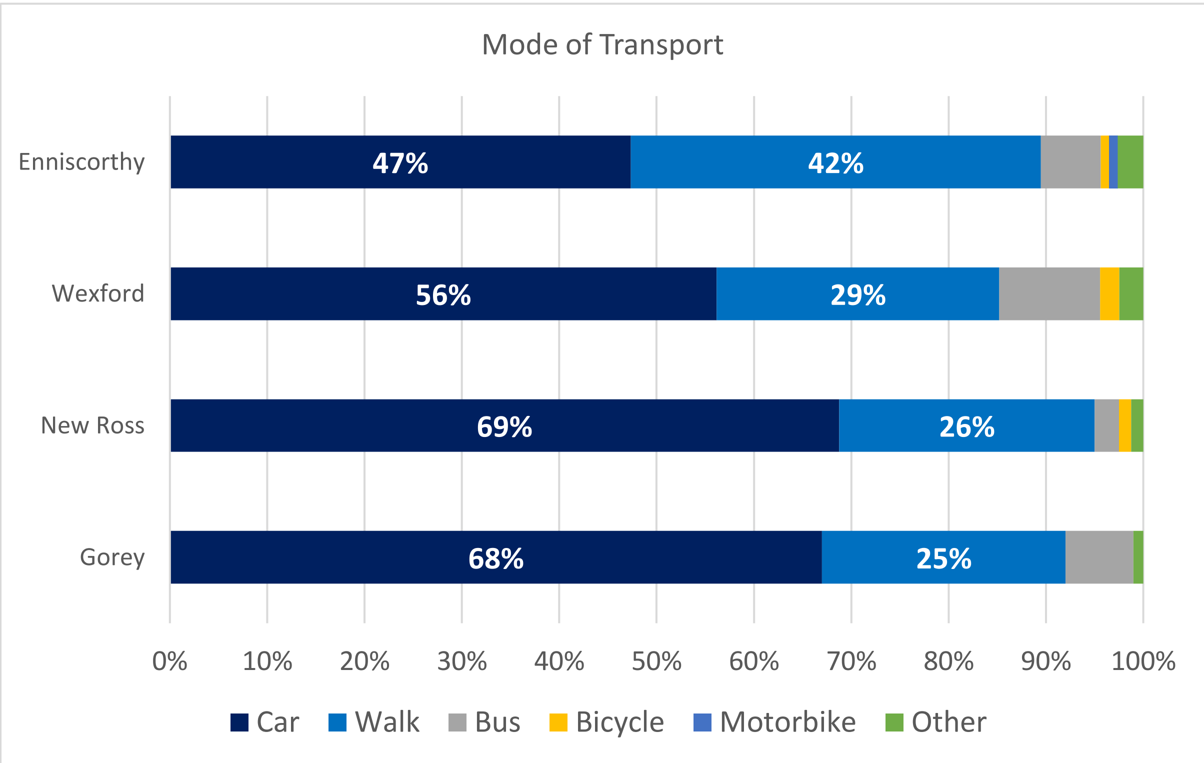
Table 3.6 Mode of Travel

How did you travel here today?							
Location	Car	Walk	Bus	Bicycle	Motorbike	Other	Total
Gorey	67	25	7	0	0	1	99
New Ross	55	21	2	1	0	1	80
Wexford	114	59	21	4	0	5	203
Enniscorthy	54	48	7	1	1	3	114
Total	290	153	37	6	1	10	496

The private car is by far the most common way to travel to each of the town centres with 58% of respondents surveyed having arrived in the town by car. Car usage was highest in Gorey and New Ross (at 67% for both towns).

Walking was the second most common form of transportation used by respondents surveyed in all four towns with a particularly high level recorded in Enniscorthy (42%).

Figure 3.1 Mode of Travel



Journey Time

A large number of respondents surveyed appear to live in close proximity to the towns as indicated by the relatively short journey times undertaken (0-10 mins cited by 48.1% of all respondents surveyed across the four towns). It is also evident that the towns perform important retail and service functions for a wide hinterland with 33.7% of those surveyed having travelled 10-20 mins to reach the town centre (most journeys were made by car). A breakdown of journey times to each town as reported by members of the public surveyed is set out below.

Table 3.7 Journey Times – Wexford Residents

How did you travel here today?							
Town	Mode	0-10 mins	10-20 mins	20-30 mins	30-45 mins	+ 45 mins	Total
ENNISCORTHY	Bicycle	1					0.2%
	Bus		4	3			1.6%
	Car	20	23	6	3		11.7%
	Motorbike	1					0.2%
	taxi	3					0.7%
	Walk	17	25	6			10.8%
GOREY	Bus	1	1		1	1	0.9%
	Car	35	11	7	1		12.1%
	taxi	1					0.2%
	Walk	16	7	1			5.4%
NEW ROSS	Bicycle	1					0.2%
	Bus				2		0.4%
	Car	33	8	1	1		9.7%
	taxi	1					0.2%
	Walk	16	1	3		1	4.7%
WEXFORD TOWN	Bicycle	1		1			0.4%
	Bus		9	6	3	1	4.3%
	Car	36	40	16	8	2	22.9%
	Walk	31	21	6	1		13.3%
	Total	48.1%	33.7%	12.6%	4.5%	1.1%	445

Journey Time for non-residents

Non-residents typically travelled for over 45 minutes to reach the destinations surveyed (35%). This was particularly the case for Wexford Town. There were much shorter journeys for non-residents to New Ross given its proximity to County Kilkenny and County Waterford and County Wicklow for Gorey residents. This is summarised in Table 3.8 overleaf.

Table 3.8 Journey Times – Non-Resident

How did you travel here today?							
Town	Mode	0-10 mins	10-20 mins	20-30 mins	30-45 mins	+ 45 mins	Total
ENNISCORTHY	Car	1				1	4%
GOREY	Bus		1			1	4%
	Car	3	4	2		3	25%
	Walk		1				2%
NEW ROSS	Car	4	5	1	1	1	25%
WEXFORD TOWN	Bicycle		1			1	4%
	Bus						0%
	Car	2	1	2	1	6	25%
	Other					1	2%
	train					3	6%
	Walk		1				2%
	Total	21%	29%	10%	4%	35%	48

Frequency of visits

For residents of County Wexford, visits to each of the four towns are a common occurrence with 73% doing so more than once per week with only 6% of respondents visiting these towns every 2 weeks or less. 16% of respondents visit the town once per week.

Table 3.9 Frequency of Visits – Wexford Residents

How often do you come to (name town) whether to shop or just look around?									
Residents	Every Day	More Than Once Per Week	Once Per Week	3 Times Per Month	Every 2 Weeks	Once A Month	Less Than Once Per Month	Total	Total%
Enniscorthy	-	81	20	3	2	3	1	113	25%
Gorey	-	71	3	1	-	2	2	83	19%
New Ross	1	50	13	1	1	-	3	70	16%
Wexford Town	1	123	36	9	6	4	3	182	41%
Total	2	325	72	14	9	9	9	448	
Total%	0%	73%	16%	3%	2%	2%	2%		

For non-residents, 37% of respondents visit the towns less than once per month which correlates with the main reason non-residents visit the town, namely for tourism reasons or as a planned day trip i.e. trips that are undertaken less frequently. This is summarised in Table 3.10 overleaf.

Table 3.10 Frequency of Visits – Non-Residents

How often do you come to (name town) whether to shop or just look around?									
Non-Residents	Every Day	More Than Once Per Week	Once Per Week	3 Times Per Month	Every 2 Weeks	Once A Month	Less Than Once Per Month	Total	Total%
Enniscorthy	-	-	1	-	-	-	1	2	4%
Gorey	-	4	1	1	2	3	4	15	31%
New Ross	-	10	1	-	-	-	1	12	24%
Wexford Town	1	3	1	1		2	12	20	41%
Total	1	17	4	2	2	5	18	49	
Total%	2%	35%	8%	4%	4%	10%	37%		

3.2.4 Average shopper expenditure

Respondents were also asked about their expenditure levels in each of the four towns on a typical shopping trip. Tables 3.11 and 3.12 below neatly summarise average spend by shopping type per MD and through an analysis of resident expenditure.

Table 3.11 Average Shopping Type Expenditure

How much, if anything, did you intend to spend on the following:				
Town	Groceries	Clothes and Footwear	Furniture and Bulky Goods	Other including eating out, hairdressers etc.
Gorey	€76.79	€69.51	€64.58	€48.58
New Ross	€50.00	€35.59	€26.85	€24.80
Wexford	€62.31	€56.68	€20.37	€31.18
Enniscorthy	€61.46	€57.95	€51.37	€25.26
Total	€63.12	€56.52	€37.15	€32.48

Table 3.12 Average Shopping Type Expenditure: Resident / Non-Resident

How much, if anything, did you intend to spend on the following:	Are you a resident of County Wexford?	
	No	Yes
Groceries	€48.17	€64.70
Clothing & Footwear	€57.78	€56.42
Furniture & Bulky Goods	€35.90	€37.38
Other (Hairdresser, eating out etc.)	€55.16	€29.69
Total	€49.78	€47.88

3.2.5 Alternative retail centres visited

Of the 443 resident and non-resident respondents to this question, 175 (40%) cited alternative retail centres located outside of County Wexford. 268 (60%) listed alternative destinations within County Wexford. Dublin City Centre was the most popular out off County destination for County Wexford residents (15%) followed by Waterford City (9%). Other popular out of county retail centres include Arklow, Carlow and Dundrum Town Centre. This is summarised below in Table 3.13.

Table 3.13 Most Frequently Visited Shopping Locations Residents and Non-Residents

What other places do you visit most frequently for shopping (both within and out of the county, if any)?			
Location	Non-Residents	Residents	All Responses
Arklow	13%	4%	5%
Carlow	7%	3%	3%
Dublin City Centre	20%	15%	16%
Dundrum Shopping Centre	2%	3%	3%
Enniscorthy	13%	6%	7%
Gorey	4%	10%	10%
Kilkenny	9%	2%	3%
New Ross	4%	4%	4%
Waterford City	7%	9%	9%
Wexford Town	13%	43%	40%
Wicklow	9%	0%	1%
Total	100%	100%	100%

Of the County Wexford resident responses to this question, 36 % of respondents travel out of County to visit alternative retail centres, with visits to Dublin City Centre equating for 15% of these trips and 9% to Waterford City.

As depicted in Table 3.14 below, there is a clear spatial correlation in the out of County centres from the origin of the survey with the majority of New Ross Residents travelling out of County to Waterford for shopping purposes (with only 1 respondent travelling to Dublin) for example. Meanwhile Gorey resident are more likely to travel to Arklow more frequently when it comes to shopping out of County.

Table 3.14 Most Frequently Visited Shopping Locations Residents

What other places do you visit most frequently for shopping (both within and out of the county)?						
Alternative Location	Enniscorthy Town	Gorey Town	New Ross Town	Wexford Town	Total	Total %
Arklow		15			15	4%
Carlow	3	1		6	10	3%
Dublin City Centre	11	10	1	39	61	15%
Dundrum Shopping Centre	1	7		5	13	3%
Enniscorthy	2		1	22	25	6%
Gorey	22	6		12	40	10%
Kilkenny		1	2	6	9	2%
New Ross				17	17	4%
Waterford City			24	11	35	9%
Wexford Town	68	35	40	27	170	43%
Wicklow		1			1	0%
Total	107	76	68	145	396	
Total%	27%	19%	17%	37%		

Frequency of visits to other retail centres by survey of origin

The combined results for the four towns show that trips to alternative centres other than the survey origins are relatively infrequent with most County Wexford residents surveyed indicating that they travel to these centres once a month or less (52.9%). 13.7% of respondents visit these alternative centres three times per month.

Table 3.15 Frequency of Visits to Alternative Retail Centres by Municipal District of Residency

How often do you visit these other places?						
Town	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Total	Total %
More than once per week	15	4	7	17	43	10.9%
Once per week	13	8	17	15	53	13.4%
3 times per month	16	11	4	23	54	13.7%
Every 2 weeks	14	6	6	10	36	9.1%
Once a month	27	20	18	27	92	23.3%
Less than once per month	25	23	15	54	117	29.6%
Total	110	72	67	146	395	
Total %	27.8%	18.2%	17.0%	37.0%		

Type of shopping carried out in alternative places

Clothes and footwear are by far the most likely reason that people will travel to alternative destinations (both in-county and out of county destinations) at 60.5%. Somewhat surprisingly particularly given the relatively low level of spend on furniture and bulky good items only 2.6% of respondents stated that they travel to alternative destinations for this type of comparison goods.

Table 3.16 Type of Shopping in Alternative Retail Centres

What type of shopping do you carry out in these other places?		
Spend type	Number	Percentage
Groceries	101	23.6%
Clothes/footwear etc.	259	60.5%
Furniture/Other bulky goods	11	2.6%
Other including eating out/hairdresser etc.	57	13.3%
Total	428	100%

3.2.6 Principal Attractions

Respondents were asked to outline the main attraction of the town in which the survey was carried out. 496 responses were received across each of the four main towns with the findings presented below.

Gorey Principal Attractions: Proximity to home was cited as the main attraction for members of the public surveyed in Gorey, Encouragingly, the good choice and high quality of shops were also commonly cited responses in Gorey.

Table 3.17 Gorey Principal Attractions

In your opinion, what is the main attraction of Gorey?		
Gorey Attractions	Number	Percent
Close to home	53	54%
High quality of shops	16	16%
Parking Access	9	9%
Good choice of shops	5	5%
Close to work	4	4%
Nice shopping environment	4	4%
Public Transport Access	3	3%
Free/cheap parking	3	3%
Good Services	1	1%
Pedestrian streets	1	1%
Total	99	100%

Enniscorthy Principal Attractions: Again, close to home was also the main attraction for Enniscorthy respondents (79%). Good choice of shops and high-quality shops have a low response rate as a principal attraction.

Table 3.18 Enniscorthy Principal Attractions

In your opinion, what is the main attraction of Enniscorthy?		
Enniscorthy Attractions	Number	Percent
Close to Home	91	79%
Nothing in Particular	8	7%
Close to Work	5	4%
Pedestrian Streets	4	3%
Public Transport Access	3	3%
Good Choice of Shops	2	2%
High Quality of Shops	1	1%
Safe Environment	1	1%
Total	115	100%

New Ross Principal Attractions: The vast majority of respondents surveyed in New Ross indicated that the biggest attraction to the town was its proximity to their home. This indicates a high level of local shopping reinforcing New Ross's function as an important retail centre for residents of south-east Wexford.

Table 3.19 New Ross Principal Attractions

In your opinion, what is the main attraction of New Ross?		
New Ross Attractions	Number	Percent
Close to home	61	77%
No Reason	5	6%
Close to work	3	4%
Public Transport Access	2	3%
High quality of shops	2	3%
Easy to find parking	1	1%
Good choice of shops	1	1%
Good for grocery shopping	1	1%
Nice shopping environment	1	1%
Pedestrian streets	1	1%
Safe environment	1	1%
Total	79	100%

Wexford Town Principal Attractions: Members of the public surveyed in Wexford Town also identified 'close to home' as the biggest attraction to the town. However, a comparatively high number of respondents (8%) referred to the good choice of shops available, access to public transport (9%) and the pedestrian friendly streets (8%) also proving a popular attractor to the town.

Table 3.20 Wexford Town Principal Attractions

In your opinion, what is the main attraction of Wexford Town?		
Wexford Attractions	Number	Percent
Close to home	114	56%
Good choice of shops	17	8%
Public Transport Access	18	9%
Pedestrian streets	16	8%
Close to work	14	7%
High quality of shops	13	6%
Easy to find parking	3	1%
Safe environment	2	1%
No Reason	3	1%
Friends	1	0%
History	1	0%
Nice shopping environment	1	0%
Total	203	100%

Satisfaction levels

General satisfaction levels on the shopping experience of each town are summarised in the table below. Gorey had the highest satisfaction ratings of all four towns with 67% of respondents stating that they are 'very satisfied'. Enniscorthy has the lowest satisfaction ratings of the towns with 19.3% of respondents expressing dissatisfaction with their shopping experiences in the town.

Table 3.21 Shopper Satisfaction Levels

How satisfied are you with your experience of shopping in this town?				
Location	Dissatisfied	Neutral	Satisfied	Very Satisfied
Gorey	1.0%	6.2%	25.8%	67%
New Ross	15.2%	3.8%	48.1%	32.9%
Wexford	6.0%	5.5%	41.5%	47.0%
Enniscorthy	19.3%	7.9%	55.3%	17.5%

3.2.7 Improvements

The final section of the Shopper Surveys focused on identifying improvements that respondents would like to see in each of the towns across the categories of travel/parking, shops, facilities, entertainment, and the general environment. The tables show the first response most frequently mentioned by the respondents. The results are presented in the series of tables below.

Gorey Improvements: Free or cheaper parking, improved public transport access and better parking provision were the main improvements cited by respondents when queried about travel and parking. Other reasons included better links from car parks to the town centre and improved signage to direct people around the town.

Table 3.22 Gorey Improvements: Travel/Parking

Gorey Improvement -Travel		
Improvement	Number	%
Free/Cheaper parking	24	33%
Improved public transport access	21	29%
Improved parking provision	14	19%
Better links from car parks to town centre	6	8%
More/better signage around town	6	8%
Better access by car	1	1%
More disabled parking spaces	1	1%
Total	73	100%

In terms of retail offer a high proportion of Gorey respondents would like to see a department or large store located in the town centre (36%) with more clothes and fashion shops also cited by 36% of respondents. 11% of respondents would like to see fewer empty or vacant shop units.

Table 3.23 Gorey Improvements: Shops

Gorey Improvement -Shops		
Improvement	Number	%
Department stores/larger stores	17	36%
More clothes and fashion shops	17	36%
Covered Shopping Centre/Food Market	5	11%
Fewer empty shops/vacancies	5	11%
Hardware shops	1	2%
More women’s clothing	1	2%
Shoe shops	1	2%
Total	47	100%

In terms of improvements to facilities more facilities for children (24%) received the highest response for Gorey. This was followed by a relatively high proportion (22%) feeling that more public toilets were required. Other improvements cited by respondents included more seating areas and an increase in security or police presence.

Table 3.24 Gorey Improvements: Facilities

Gorey Improvement -Facilities		
Improvement	Number	%
More facilities for children	15	24%
More toilets	14	22%
More seating areas	11	17%
Better security/CCTV/Police	10	16%
More facilities for people with disabilities	9	14%
Crèche	2	3%
Pedestrian lights	1	2%
Taxi ranks	1	2%
Total	63	100%

A higher provision of leisure attractions was the most commonly cited improvement by respondents (42%) in the entertainment category. This was followed by more promotions or events (19%) and more bars or nightclubs (12%). The lowest response was for more restaurants with 8% of those surveyed seeking such an improvement. This is summarised in Table 3.25 below.

Table 3.25 Gorey Improvements: Entertainment

Gorey Improvement -Entertainment		
Improvements	Number	%
More leisure attractions	22	42%
More promotions/events	10	19%
More bars/nightclubs	6	12%
More cafes	6	12%
More cash machines	4	8%
More restaurants	4	8%
Total	52	100%

More leisure attractions, a nicer shopping environment and more pedestrianised streets all featured highly in terms of requirements for improvements to the general environment of Gorey town centre.

Table 3.26 Gorey Improvements: Environment

Gorey Improvement -Environment		
Improvements	Number	%
More leisure attractions	10	24%
Pedestrian streets	9	21%
Nicer shopping environment	8	19%
Cleaning (dogs)	4	10%
General Cleaning	4	10%
More promotions/events	4	10%
Bring back the old market	1	2%
Presence of particular retailers	1	2%
Reduce public drinking	1	2%
Total	42	100%

New Ross Improvements: New Ross respondents would like to see free and cheaper parking and also improved provision for parking. However, from the responses received New Ross is performing well in terms of access to the retail core of the town by way car, while parking for people with disabilities also scored highly.

Table 3.27 New Ross Improvements: Travel/Parking

New Ross Improvement -Travel		
Improvement	Number	%
Free/Cheaper parking	20	43%
Improved parking provision	20	43%
Better/more frequent bus service	4	9%
Better access by car	2	4%
Parking for people with disabilities	1	2%
Total	47	100%

A greater provision of clothes and fashion shops would improve the town according to 37% of respondents surveyed with regard to the retail offer while a relatively high proportion would also like to see a department store or larger store occupant enter the town centre. Other suggestions proposed by respondents include a covered shopping centre or food market and fewer empty or vacant shop units.

Table 3.28 New Ross Improvements: Shops

New Ross Improvement -Shops		
Improvement	Number	%
More clothes and fashion shops	16	37%
Department stores/larger stores	8	19%
Covered Shopping Centre/Food Market	7	16%
Fewer empty shops/vacancies	3	7%
Discount stores	2	5%
Larger stores	2	5%
Earlier opening times	1	2%
More affordable clothes shops	1	2%
More independent shops	1	2%
More quality/designer shops	1	2%
Sports shop	1	2%
Total	43	100%

The addition of public toilets was cited by 65% of respondents surveyed in New Ross in terms of improvements they would like to see made to facilities in the town. This was followed by 15% of respondents seeking more facilities for children.

Table 3.29 New Ross Improvements: Facilities

New Ross Improvement -Facilities		
Improvement	Number	%
More toilets	13	65%
More facilities for children	3	15%
Better security/CCTV/Police	1	5%
Cheaper rates for leisure centre	1	5%
Crèche	1	5%
More facilities for people with disabilities	1	5%
Total	20	100%

New Ross respondents would also like to see more bars/nightclubs, leisure attractions and restaurants to improve the entertainment offer of the town. The town appears to be performing well in terms of activities available for retirees based on the response rate.

Table 3.30 New Ross Improvements: Entertainment

New Ross Improvement -Entertainment		
Improvements	Number	%
More bars/nightclubs	10	29%
More leisure attractions	6	18%
More restaurants	6	18%
More cafes	4	12%
More cash machines	3	9%
More promotions/events	3	9%
Cinema / bowling alley	1	3%
More activities for retirees	1	3%
Total	34	100%

In terms of the general environment, the presence of particular retailers and a nicer general shopping environment were cited as the primary improvement's respondents would like to see in New Ross. This was followed by more pedestrianised streets and more promotions or events within the town.

Table 3.31 New Ross Improvements: Environment

New Ross Improvement -Environment		
Improvements	Number	%
Presence of particular retailers	11	27%
Nicer shopping environment	9	27%
Pedestrian streets	4	12%
More promotions/events	3	9%
Reduce Vacancy (North Main St)	3	9%
Cleaning (dogs)	1	3%
Opening hours of shops	1	3%
Paint the town	1	3%
Total	33	100%

Wexford Town Improvements: Cheaper parking was cited as the most popular improvement respondents sought in Wexford Town. This was followed by improved parking provision and public transport access. Only 1% of respondents sought less traffic and better cycle provision respectively within the town**.** This is summarised in Table 3.32 overleaf.

Table 3.32 Wexford Town Improvements: Travel/Parking

Wexford Improvement -Travel		
Improvement	Number	%
Cheaper parking	35	26%
Improved parking provision	32	24%
Improved public transport access	26	20%
Free parking	24	18%
Better access by car	6	5%
Better links from car parks to town centre	4	3%
More/better signage around town	4	3%
Better cycling provisions	1	1%
Less traffic	1	1%
Total	133	100%

In terms of retail a covered shopping centre or food market was the main improvement cited by respondents followed by department stores or larger stores. 10% of responses outlined the provision of more quality/designer shops as a way of improving the town centre.

Table 3.33 Wexford Town Improvements: Shops

Wexford Improvement -Shops		
Improvement	Number	%
Covered Shopping Centre/Food Market	27	28%
Department stores/larger stores	22	22%
Fewer empty shops/vacancies	18	18%
More clothes and fashion shops	15	15%
More quality/designer shops	10	10%
More discount stores	5	5%
Music shop	1	1%
Total	98	100%

Respondents felt that more toilets would benefit the town (36%) and additional facilities for children (22%) and people with disabilities (17%) would be welcomed. Encouragingly only 1% of respondents suggested that the streets in Wexford Town could be cleaner suggesting that most respondents are content with the current level of cleanliness of the town. This is summarised in Table 3.34 overleaf.

Table 3.34 Wexford Town Improvements: Facilities

Wexford Improvement -Facilities		
Improvement	Number	%
More toilets	40	36%
More facilities for children	24	22%
More facilities for people with disabilities	19	17%
Better security/CCTV/Police	13	12%
More seating areas	12	11%
Crèche	2	2%
Cleaner streets	1	1%
Total	111	100%

Wexford respondents would also like more leisure attractions and cash machines within the town. With increased provision of bars/nightclubs, cafés and restaurants the next most sought-after improvements to the entertainment offering within Wexford Town.

Table 3.35 Wexford Town Improvements: Entertainment

Wexford Improvement -Entertainment		
Improvements	Number	%
More leisure attractions	19	22%
More cash machines	18	20%
More bars/nightclubs	14	16%
More restaurants	14	16%
More cafes	12	14%
More promotions/events	10	11%
More Gyms	1	1%
Total	88	100%

Increased provision of pedestrianised streets was highlighted by 37% of respondents. This was separately followed by 26% of respondents who felt that a nicer shopping environment would benefit the town.

Table 3.36 Wexford Town Improvements: Environment

Wexford Improvement -Environment		
Improvements	Number	%
Pedestrian streets	32	37%
Nicer shopping environment	22	26%
More leisure attractions	13	15%
More promotions/events	9	10%
Presence of particular retailers	5	6%
Cleaning (dogs)	2	2%
Parking regulation	1	1%
Cleaner Streets	1	1%
Other	1	1%
Total	86	100%

Enniscorthy Improvements: Improved parking provision was the most popular suggestion for improving travel and parking in Enniscorthy. This was followed by public transport access which 25% of respondents felt needed to be improved. Only 2% of respondents cited traffic congestion in Wexford Town as requiring improvement.

Table 3.37 Enniscorthy Improvements: Travel/Parking

Enniscorthy Improvement -Travel		
Improvement	Number	%
Improved parking provision	14	29%
Improved public transport access	12	25%
Free/Cheaper parking	10	21%
Better access by car	4	8%
Better links from car parks to town centre	4	8%
Remove on-street parking	3	6%
Traffic congestion	1	2%
Total	48	100%

More clothes and fashion shops followed by department stores and larger stores were the most commonly suggested improvements in terms of shopping provision in Enniscorthy. A covered shopping centre was also suggested by 12% of respondents with fewer empty shops or vacant units noted by 10%.

Table 3.38 Enniscorthy Improvements: Shops

Enniscorthy Improvement -Shops		
Improvement	Number	%
More clothes and fashion shops	45	49%
Department stores/larger stores	18	20%
Covered shopping centre	11	12%
Fewer empty shops/vacancies	9	10%
More quality/designer shops	4	4%
Earlier opening hours	1	1%
Less boutiques and more franchises	1	1%
Maintain the small shops in the area	1	1%
More affordable shops	1	1%
More discount stores	1	1%
Total	92	100%

For facilities, 42 % of Enniscorthy respondents would like to see more facilities for children within the town. This was followed by 35% seeking more toilets and 11% seeking a greater provision of seating areas. A small number of respondents sought cleaner streets and more facilities for retirees indicating that the town is functioning well in these regards.

Table 3.39 Enniscorthy Improvements: Facilities

Enniscorthy Improvement -Facilities		
Improvement	Number	%
More facilities for children	28	42%
More toilets	23	35%
More seating areas	7	11%
More facilities for disabled	3	5%
Better security/CCTV/Police	2	3%
Cinema	1	2%
Cleaner Streets	1	2%
More facilities for retirees	1	2%
Total	66	100%

26% of respondents indicated that more Cafés were required in Enniscorthy to enhance the entertainment offering. This was followed by an acknowledgement that more leisure attractions (20%) and promotions or events (18%) would aid the town from an entertainment perspective.

Table 3.40 Enniscorthy Improvements: Entertainment

Enniscorthy Improvement -Entertainment		
Improvements	Number	%
More cafes	13	26%
More leisure attractions	10	20%
More promotions/events	9	18%
Cinema	7	14%
More bars/nightclubs	5	10%
More restaurants	5	10%
Take away	1	2%
Total	50	100%

A nicer shopping environment was cited as the main improvement that 52% respondents would like to see in the town. This was followed by respondents seeking an increase in the provision of pedestrianised streets. A combined 6% (3 people) of respondents indicated that more leisure attractions, shops and things for young people would aid the environment of Enniscorthy town centre. This is summarised in Table 3.41 overleaf.

Table 3.41 Enniscorthy Improvements: Environment

Enniscorthy Improvement -Environment		
Improvements	Number	%
Nicer shopping environment	26	52%
Pedestrian streets	10	20%
Presence of particular retailers	6	12%
More promotions/events	5	10%
More leisure attractions	1	2%
More shops	1	2%
Things for young people	1	2%
Total	50	100%

3.2.8 Summary Shopper Surveys

The Shopper Surveys have provided key insights into the shopping habits of both the residents and non-residents who visit the four main towns of County Wexford.

From this it has been extrapolated that respondents in Gorey had the highest average spend across all categories of shopping including for groceries, clothing and footwear and furniture and bulky goods.

New Ross respondents had the lowest average spends across grocery, clothing and footwear shopping while Wexford had the lowest spend on furniture and bulky goods.

A comparison of resident and non-resident spend indicates that the spend of these groups was generally comparable across the clothing, footwear, furniture and bulky goods shopping types.

It is also evident that the non-residents had a higher average spend on comparison shopping, while non-residents tended to spend more on 'other' shopping types such as eating out or going to the hairdresser, etc. The shopper surveys also showed the primary reason respondents visited alternative retail centres was to conduct clothing and footwear shopping.

Leakage

A summary overview of the Shopper Survey results on retail leakage is provided below:

- 36% of County Wexford residents cited that they travel out of the county to visit alternative centres for shopping purposes

- Dublin City Centre is County Wexford's most significant out of county retail competitor with 15% of residents surveyed travelling to Dublin City for shopping
- The second most popular alternative shopping destination for residents surveyed is Waterford City (9%)
- Encouragingly, the results indicate that the County Wexford resident respondents in all of Gorey, New Ross and Enniscorthy are most likely to travel to Wexford Town than other destinations (in or out of the county) for shopping as an alternative to shopping in the town that the survey was undertaken in
- There is a clear spatial correlation in out of county trips based on the geographical location of the survey town with the majority of out of county trips in New Ross going to Waterford City, while respondents in Gorey would travel to Arklow or Dundrum Shopping Centre more frequently
- The second most popular destination for survey respondents in Gorey is Arklow (20%)
- The second most popular destination for survey respondents in New Ross is Waterford City (35%)
- The second most popular destination for survey respondents in Enniscorthy is Gorey (20.5%)
- Wexford Town respondents are most likely to travel to Dublin City Centre than any other destination (27%)

The survey results indicate that Dublin City is a significant draw despite the longer journey times incurred. However, based on other popular alternative retail destinations cited it appears that travel time and proximity is a significant factor with Arklow located just 17km north of Gorey and Waterford City just 22km from New Ross.

3.3 Household Survey Results

A total of 502 household surveys were also carried out during the months of December 2017 and January 2018 (prior to the suspension of statutory timeframes for the CDP). The number of responses per question varies as in some cases the respondent did not wish to answer a particular question(s).

Notwithstanding this, it is considered that the results are statistically robust as the response rate was very high. The household surveys comprised 502 phone interviews with randomly selected households with a population proportional and spatially distributed across the four electoral areas of County Wexford.

The household surveys were designed to give an insight into the shopping behaviour of County Wexford residents. The Householder surveys can pick up different trends, such as people who don't shop in their nearest main centre or who carry out a lot of shopping online.

The survey was structured in six parts as listed below:

- Main Grocery Shopping
- Top-Up Shopping
- Clothing and Footwear
- Bulky Household Goods
- Online Shops
- Shopping Experience

Respondents were asked to cite the reasons they choose a specific shopping location, the frequency of shopping, transport modes, expenditure on shopping and how satisfied there are with the shopping experience provided across the towns and villages of County Wexford.

The results were collated and analysed to identify the market share of the various retail centres located throughout the county, the significance of each type of retail (convenience, comparison and bulky goods) and the amount of retail leakage from the county.

3.3.1 Main Grocery Shopping

A breakdown of where people go to shop according to their location is provided in Tables 3.42-3.45 overleaf. The results reinforce the importance of the four main towns of Wexford, Enniscorthy, New Ross and Gorey in providing essential retail functions to smaller settlements in the wider Municipal Districts in which they are located.

The results also confirm that the district towns and smaller settlements are also functioning well in terms of responding to basic retail needs of the communities that they serve.

Main Grocery Shopping Destinations of Wexford and Rosslare MD residents

Table 3.42 Main Grocery Shopping Destinations of Wexford and Rosslare MD Residents

Where do you most often go to do your main grocery shopping?												
Wexford MD Origin-Destination Matrix (Main Grocery Shopping)												
Location	Black-water	Ennis-corthy	Gorey	Kil-more	Kilmuck-ridge	New Ross	Pierse-town	Rosslare Harbour	Rosslare Strand	Wexford Town	Total	Total %
Ballygeary	-	-	-	-	-	-	-	7	1	6	14	7%
Barntown	-	-	-	-	-	-	-	-	-	7	7	3%
Bridgetown	-	-	-	-	-	-	-	-	-	3	3	1%
Broadway	-	-	-	-	-	-	-	-	-	2	2	1%
Castlebridge	1	-	1	-	1	-	-	-	-	7	10	5%
Cleariestown	-	-	-	-	-	-	-	-	-	4	4	2%
Crossabeg	-	1	-	-	-	-	-	-	-	4	5	2%
Curracloe	-	-	-	-	-	-	-	-	-	3	3	1%
Glenbrien	-	1	-	-	-	-	-	-	-		1	0%
Killinick	-	-	-	-	-	-	2	2	-	3	7	3%
Killurin	-	-	-	-	-	1	-	-	-	6	7	3%
Kilmore	-	-	-	1	-	-	-	-	-	3	4	2%
Kilmore Quay	-	-	-	-	-	-	-	-	-	4	4	2%
Kilrane	-	-	-	-	-	-	-	2	-	1	3	1%
Murntown	-	-	-	-	-	-	-	-	-	8	8	4%
Piercestown	-	-	-	-	-	-	-	-	-	2	2	1%
Rosslare	-	-	-	-	-	-	-	1	-	6	7	3%
Screen	-	-	-	-	-	-	-	-	-	2	2	1%
Tagoat	-	-	-	-	-	-	-	-	-	2	2	1%
Wexford Town	-	-	1	-	-	-	-	1	-	110	112	54%
Total	1	2	2	1	1	1	2	13	1	183	207	
Total %	0%	1%	1%	0%	0%	0%	1%	6%	0%	88%		

Main Grocery shopping destinations of Enniscorthy MD residents

Table 3.43 Main Grocery shopping destinations of Enniscorthy MD Residents

Where do you most often go to do your main grocery shopping?								
Enniscorthy MD Origin-Destination Matrix (Main Grocery Shopping)								
Location	Arklow	Bunclody	Carlow	Enniscorthy	Oulart	Wexford Town	Total	Total %
Ballindaggin				2			2	2%
Ballycarney				1			1	1%
Ballyhogue				1		3	4	4%
Ballymurn				3		3	6	6%
Bree				4			4	4%
Bunclody-Carrickduff		7		2			9	8%
Caim				3			3	3%
Clonegal			1				1	1%
Enniscorthy	1			57		7	65	61%
Glenbrien				1		1	2	2%
Killanne				3			3	3%
Marshalstown				1			1	1%
Oilgate						5	5	5%
Oulart					1		1	1%
Total	1	7	1	78	1	19	107	
Total %	1%	7%	1%	73%	1%	18%		

Main Grocery shopping destinations of New Ross MD residents

Table 3.44 Main Grocery shopping destinations of New Ross MD Residents

Where do you most often go to do your main grocery shopping?											
New Ross MD Origin-Destination Matrix (Main Grocery Shopping)											
Location	Adams-town	Bun-clody	Cam-pile	Ennis-corthy	Fethard-On-Sea	New Ross	Water-ford	Wellington-bridge	Wexford Town	Total	Total %
Adamstown	1			2		2			2	7	7%
Ballycullane			1					5		6	6%
Ballymitty									2	2	2%
Ballywilliam				1		4				5	5%
Campile								1		1	1%
Clonroche				3		1			1	5	5%
Duncannon						1			1	2	2%
Duncormick								1	2	3	3%
Fethard-On-Sea					2	1		2	1	6	6%
Foulksmills						2		2	3	7	7%
Gusserane						1				1	1%
Newbawn						2		1		3	3%
New Ross						41	1		2	44	44%
Ramsgrange						1				1	1%
Rathnure		1								1	1%
Taghmon									4	4	4%
Wellingtonbridge								2		2	2%
Total	1	1	1	6	2	56	1	14	18	100	
Total %	1%	1%	1%	6%	2%	56%	1%	14%	18%		

Main Grocery shopping destinations of Gorey MD residents

Table 3.45 Main Grocery shopping destinations of Gorey MD Residents

Where do you most often go to do your main grocery shopping?							
Enniscorthy MD Origin-Destination Matrix (Main Grocery Shopping)							
Location	Enniscorthy	Ferns	Gorey	Kilmuckridge	Wexford Town	Total	Total %
Ballygarrett			2	1		3	4%
Camolin			3			3	4%
Coolgreany			1			1	1%
Courtown Harbour-Riverchapel-Ardamine			9			9	11%
Craanford			2			2	2%
Ferns	6	2	3			11	13%
Gorey			50			50	59%
Inch			3			3	4%
Kilmuckridge	1		1		1	3	4%
Total	7	2	74	1	1	85	
Total %	8%	2%	87%	1%	1%		

Stores visited for main grocery purchases

Residents of County Wexford are most likely to shop in Supervalu (37.6% of respondents) – which has a high presence throughout the County. Tesco and Dunnes Stores are the second and third most popular supermarket for Wexford shoppers.

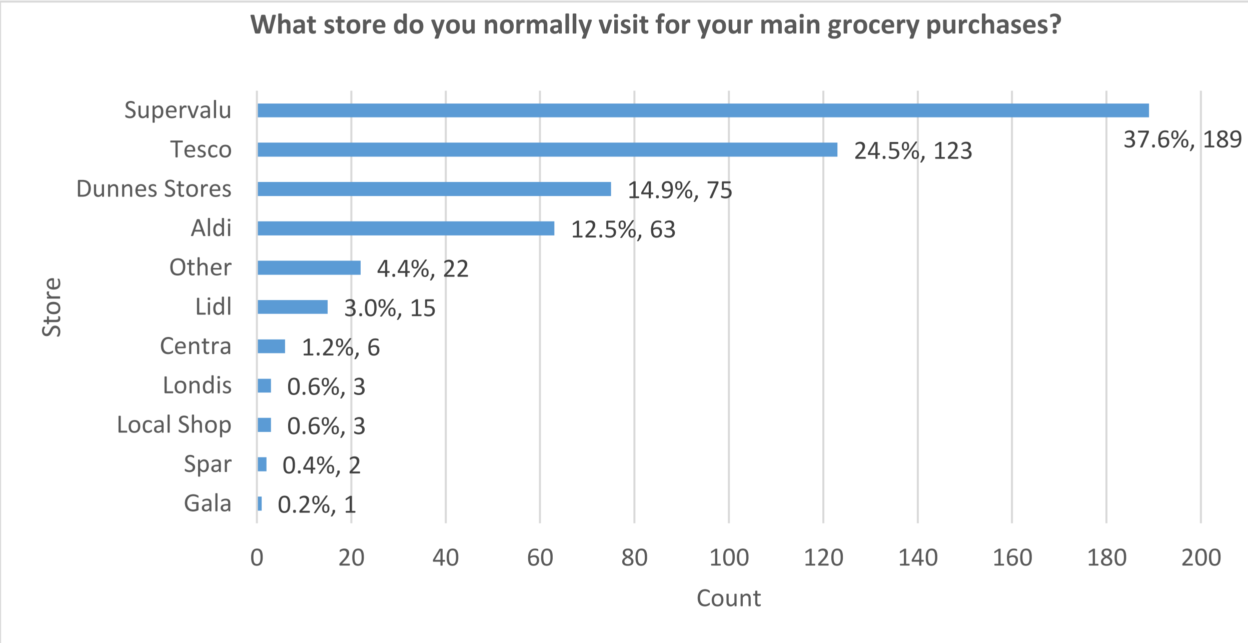


Figure 3.2 Stores for Main Grocery Purchase

Expenditure on Main Food and Grocery Shopping

Information on the expenditure levels of the respondents' last main grocery shop is set out in Figure 3.3 overleaf. The largest proportion of respondents spent between 50 and 100 euro (42.6%%) and 41% spent between 100 and 200 Euro.

Table 3.46 overleaf highlights the comparison between the range of expenditure in each of the four MDs and also those respondents who conducted their main grocery shopping outside of the County. According to the survey results, residents of Enniscorthy MD are most likely to spend over 100 euro on their main grocery shop, with New Ross MD residents most likely to spend less than 100 euro.

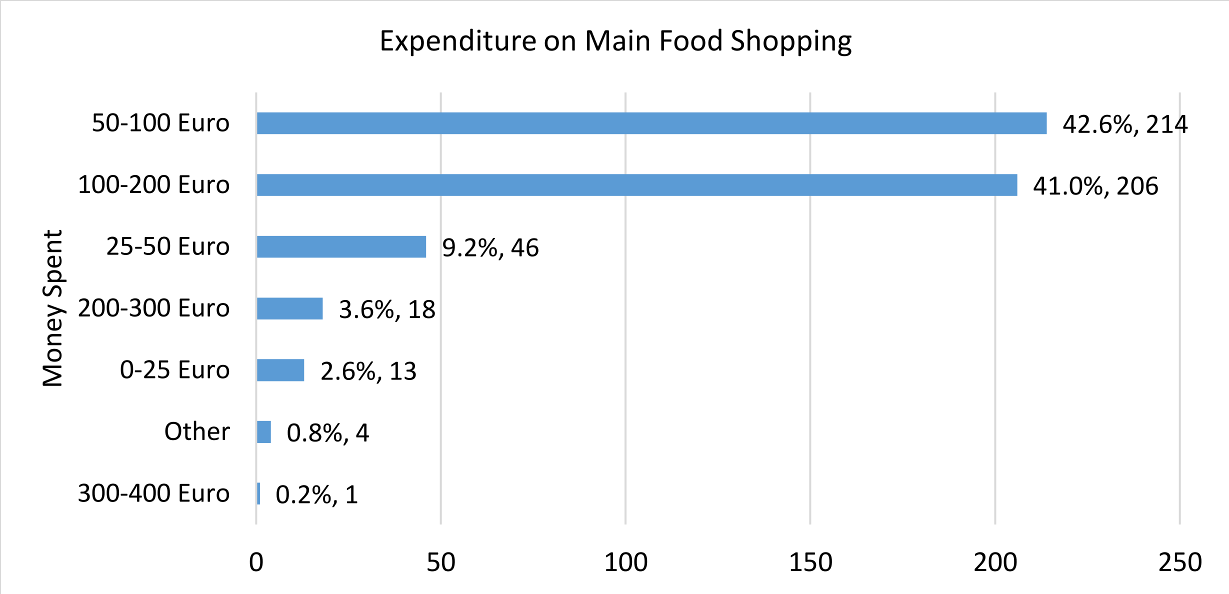


Figure 3.3 Expenditure on Main Grocery Shopping

Expenditure on Main Grocery Shopping Per MD

Table 3.46 Expenditure on Main Grocery Shopping Per MD (by destination)

How much did you spend on your last grocery shopping trip for your main grocery purchases?					
Expenditure Range	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Outside Of County[11]
300-400 Euro	0%	0%	0%	0%	0%
200-300 Euro	10%	4%	1%	2%	0%
100-200 Euro	46%	41%	32%	42%	36%
50-100 Euro	35%	41%	45%	45%	45%
25-50 Euro	5%	10%	14%	8%	18%
0-25 Euro	3%	4%	6%	1%	0%
Other	1%	0%	0%	1%	0%
Total	100%	100%	100%	100%	100%

Mode of Transport and Frequency of Main Shopping Trip

The respondents were asked how they travel to carry out their main grocery shopping. The results indicate that County Wexford shoppers are highly dependent on the private car with 92% of respondents surveyed citing this mode of transport.

[11] Those respondents who conduct their main grocery shop outside of the County

The second most popular form of transport is walking as informed by 6% of respondents. 79% of respondents conduct their main grocery shop four times per month as indicated in Figure 3.4.

Table 3.47 Main Food Shopping Per MD: Mode of Transport (by destination)

What mode of transport do you usually take when doing your main grocery shopping?							
Mode	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Outside of County	Total	Total%
Bus				1		1	0%
Taxi	2			2		4	1%
Other	2	3		1		6	1%
Walk	4	3	4	18	1	30	6%
Private car	86	76	73	216	10	461	92%
Total	94	82	77	238	11	502	
Total%	19%	16%	15%	47%	2%		

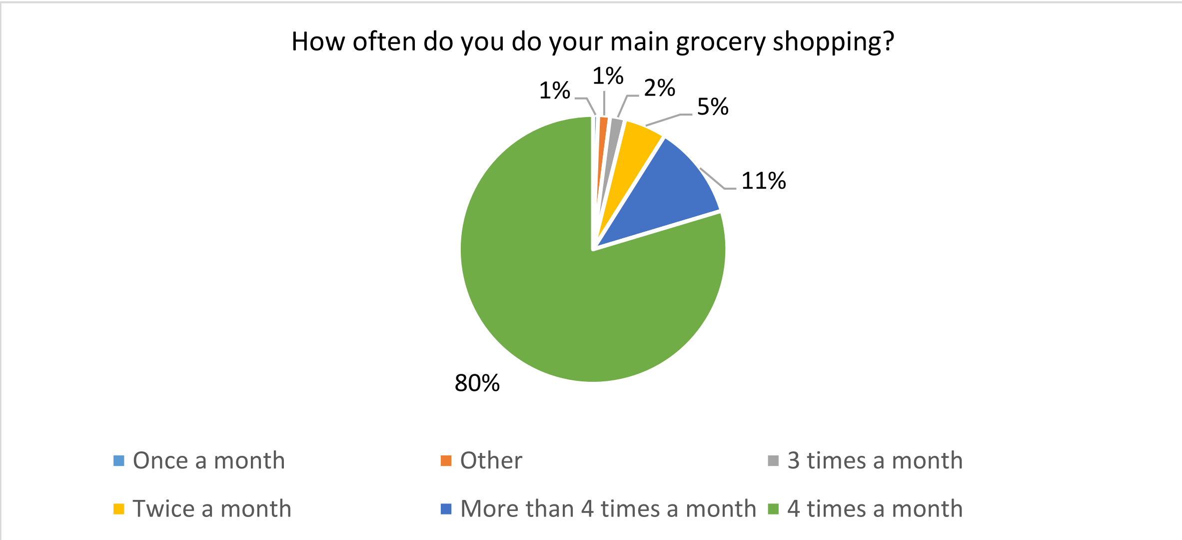


Figure 3.4 How often do you do your main grocery shopping?

Main Reasons for carrying out Main Grocery Shop in a Particular Location

As was the case with the on-street shopper surveys, convenience appears to be the central most important factor in why people choose a particular location to shop with 'close to home' by far the most frequently cited response for County Wexford residents surveyed by phones indicated in Table 3.48 below. Value for money was the second most popular reason why respondents shop in a given location.

Table 3.48 Main Reasons for Grocery Shopping in a particular location

What is the main reason you do your main grocery shopping in this location?												
Location	Cheap or free parking	Choice of Goods	Close to home	Close to other shops	Closer to work	Ease of parking	Other	Quality of goods	Support local business	Value for Money	Total	Total%
Adamstown	-	-	1	-	-	-	-	-	-	-	1	0%
Arklow	-	-	-	-	-	-	-	1	-	-	1	0%
Blackwater	-	-	1	-	-	-	-	-	-	-	1	0%
Bunclody	-	-	6	-	-	-	-	-	1	1	8	2%
Campile	-	-	-	-	-	-	-	-	-	1	1	0%
Carlow	-	-	-	-	-	-	1	-	-	-	1	0%
Enniscorthy	1	-	74	-	1	4	1	2	1	9	93	19%
Ferns	-	-	2	-	-	-	-	-	-	-	2	0%
Fethard-On-Sea	-	-	2	-	-	-	-	-	-	-	2	0%
Gorey	-	7	46	-	-	1	4	2	3	13	76	15%
Kilmore	-	-	1	-	-	-	-	-	-	-	1	0%
Kilmuckridge	-	-	2	-	-	-	-	-	-	-	2	0%
New Ross	-	2	44	-	-	4	-	-	1	6	57	11%
Oulart	-	-	1	-	-	-	-	-	-	-	1	0%
Piercestown	-	-	2	-	-	-	-	-	-	-	2	0%
Ramsgate	-	-	1	-	-	-	-	-	-	-	1	0%

(Continued from previous)												
Location	Cheap or free parking	Choice of Goods	Close to home	Close to other shops	Closer to work	Ease of parking	Other	Quality of goods	Support local business	Value for Money	Total	Total%
Rosslare	-	-	4	-	-	-	-	-	-	-	4	1%
Rosslare Harbour	-	-	9	-	-	-	-	-	-	-	9	2%
Rosslare Strand	-	-	1	-	-	-	-	-	-	-	1	0%
Waterford	-	-	-	-	-	-	-	-	-	1	1	0%
Wellingtonbridge	-	2	12	-	1	-	-	-	-	1	16	3%
Wexford Town	-	19	134	1	2	8	5	7	6	39	221	44%
Total	1	30	343	1	4	17	11	12	12	71	502	
Total%	0%	6%	68%	0%	1%	3%	2%	2%	2%	14%		

Satisfaction Levels of Shoppers

For the most part, satisfaction levels were quite high across all the locations listed in the surveys as areas where respondents to their main grocery shop as outlined in Table 3.49 below. The vast majority of respondents stated that they were either very satisfied or satisfied with their experience of food and grocery shopping in the town that they identified as the place that they are most likely to shop.

Table 3.49 Main Grocery Shopping Shopper Satisfaction (by destination)

How satisfied are you with your experience of the grocery shopping in this location?				
Location	Dissatisfied	Neutral	Satisfied	Very satisfied
Adamstown	0%	0%	0%	100%
Arklow	0%	0%	100%	0%
Blackwater	0%	0%	0%	100%
Bunclody	0%	0%	50%	50%
Campile	0%	0%	0%	100%
Carlow	0%	0%	0%	100%
Enniscorthy	2%	3%	44%	51%
Ferns	0%	0%	50%	50%
Fethard-On-Sea	0%	0%	50%	50%
Gorey	0%	1%	41%	58%
Kilmore	0%	0%	0%	100%
Kilmuckridge	0%	0%	0%	100%
New Ross	0%	0%	47%	53%
Oulart	0%	0%	0%	100%
Piercestown	0%	0%	50%	50%
Ramsgate	0%	0%	0%	100%
Rosslare	0%	0%	50%	50%
Rosslare Harbour	0%	0%	11%	89%
Rosslare Strand	0%	0%	0%	100%
Waterford	0%	0%	0%	100%
Welllingtonbridge	0%	6%	25%	69%
Wexford Town	0%	4%	33%	62%
Total	1%	3%	37%	59%

3.3.2 Top-Up Shopping

The survey contained questions in relation to 'top-up' shopping. This type of shopping is for routine items like bread and milk.

Top-Up Grocery shopping destinations within Enniscorthy MD

Enniscorthy is the location of choice for 69% of residents of the wider Municipal District surveyed for carrying out their top-up shop. Smaller settlements most notably Bunclody, Ballymurn and Bree also provide an important function in this regard. While there is some leakage of retail spend to centers within the other MDs of County Wexford, out of county leakage for top-up goods is not an issue.

Table 3.50 Destinations for Top-Up Shopping in Enniscorthy MD

Where would you most often do your top-up grocery shopping?		
Enniscorthy MD	Total	Percent
Ballindaggin	1	1%
Ballymurn	8	8%
Bree	7	7%
Bunclody	9	9%
Castledockrell (SP)	1	1%
Enniscorthy	67	69%
Oilgate	3	3%
Oulart	1	1%
Total	97	100%

Top-Up Grocery shopping destinations of Gorey MD Residents

Gorey is the primary retail center for top-up shoppers residing in Gorey MD with 57% of respondents undertaking this activity in this location. This followed by Ferns.

Table 3.51 Destinations for Top-Up Shopping in Gorey MD

Where would you most often do your top-up grocery shopping?		
Gorey MD	Total	Percent
Ballycanew	1	1%
Ballygarrett	3	4%
Blackwater	3	4%
Camolin	3	4%
Coolgreany	1	1%
Courtown	3	4%
Ferns	10	12%
Gorey	47	57%
Hollyford	1	1%
Inch	1	1%
Killinierin	4	5%
Kilmuckridge	4	5%
Riverchapel	2	2%
Total	83	100%

Top-Up Grocery shopping destinations of New Ross MD Residents

New Ross is also the most popular shopping destination for top-up shopping in New Ross MD with the towns of Welllingtonbridge and Adamstown also proving popular.

Table 3.52 Destinations for Top-Up Shopping in New Ross MD

Where would you most often do your top-up grocery shopping?		
New Ross MD	Total	Percent
Adamstown	7	7%
Ballinaboola	2	2%
Ballycullane	1	1%
Ballywilliam	4	4%
Campile	2	2%
Clonroche	5	5%
Fethard -On-Sea	6	6%
Foulksmills	2	2%
Irishtown	3	3%
New Ross	39	40%
Ramsgrange	5	5%
Taghmon	3	3%
Waddington	1	1%
Wellingtonbridge	17	18%
Total	97	100%

Top-Up Grocery shopping destinations of Wexford and Rosslare MD Residents

The top-up grocery shopping destinations of Wexford and Rosslare MD residents surveyed show a strong preference for Wexford Town with district centres and smaller settlements of Castlebridge, Rosslare Harbour also featuring.

Table 3.53 Destinations for Top-Up Shopping in Wexford and Rosslare MD

Where would you most often do your top-up grocery shopping?		
Wexford and Rosslare MD	Total	Percent
Baldwinstown	1	0%
Barntown	1	0%
Belvedere	1	0%
Bishopswater	1	0%
Bridgetown	9	4%
Broadway	1	0%
Castlebridge	11	5%
Cleariestown	1	0%
Curracloe	4	2%
Ferndale	1	0%
Glenbrook	1	0%

(Continued from previous)		
Wexford and Rosslare MD	Total	Percent
Glynn	3	1%
Killinick	5	2%
Kilmore	3	1%
Kilmore Quay	2	1%
Mulgannon	1	0%
Murntown	1	0%
Piercestown	8	4%
Rosslare	5	2%
Rosslare Harbour	13	6%
Rosslare Strand	2	1%
Tagoat	1	0%
Wexford Town	137	64%
Total	214	100%

Mode of Transport and Frequency of Top-Up Grocery Shopping Trip

The private car remains the most popular mode of transport for top-up shop suggesting that people still prefer to travel to a centre for smaller items rather than walk or cycle though this may also be associated with the rural location in which a large number of respondents reside. Top-up shopping is a regular occurrence for respondents – with most people in the County stating that they undertake this type of shopping every few days.

Table 3.54 Top-Up Shopping Mode of Transport

What mode of transport do you normally take for your top-up shopping							
Mode	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Outside of County	Total	Total %
Bus				2		2	0%
Cycle				1		1	0%
Other		2		7		9	2%
Private car	69	64	90	160	10	393	80%
Walk	19	17	7	44	2	89	18%
Total	88	83	97	214	12	494	
Total %	18%	17%	20%	43%	2%		

The frequency at which respondents undertake their top-up shopping has been summarised overleaf in Figure 3.5.

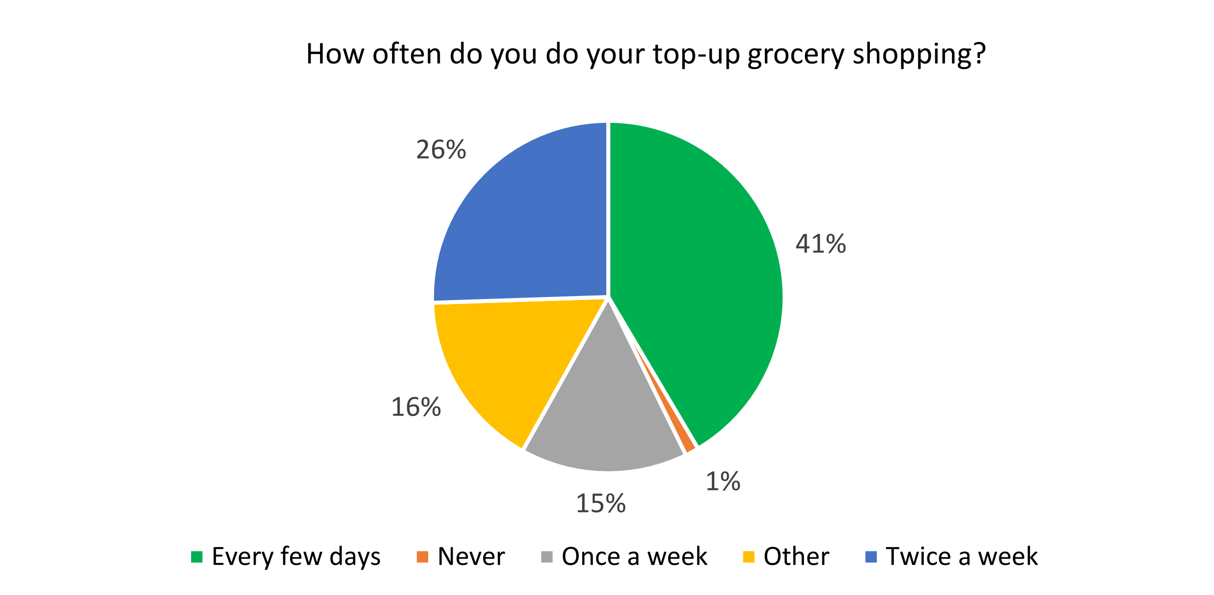


Figure 3.5 Frequency of Top-Up Shopping

Main Reason for carrying out Top-Up Shop in a Particular Location

Close to home was by far the most commonly referred to reason for why respondents choose a specific location to do their top-up shop which is expected when conducting a convenient top-up shop.

Table 3.55 Reason for Top-Up Shop in a Particular Location

What is the main reason you do your 'top-up' shopping in this location?							
Reason	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Outside of County	Total	Total%
Choice of goods			1	5		6	1%
Close to home	82	75	90	175	10	432	87%
Close to other shops				1		1	0%
Closer to work	3	1	3	6		13	3%
Ease of Parking		1	1	2		4	1%
Other	1	2		9		12	2%
Quality of goods				3	1	4	1%
Support local business		1	2	3	1	7	1%
Value for money	2	3		10		15	3%
Total	88	83	97	214	12	494	
Total%	18%	17%	20%	43%	2%		

Satisfaction Levels of Shoppers

Overall, satisfaction levels for top-up shopping in County Wexford were high with most respondents stating that they were either satisfied or very satisfied with the shopping experience provided in this regard.

Table 3.56 Satisfaction of Shoppers

How satisfied are you with your experience of top-up grocery shopping in this town?							
Satisfaction	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Outside of County	Total	Total %
Dissatisfied		1				1	0%
Neutral	3	1	2	5		11	2%
Other				6		6	1%
Satisfied	44	30	29	77	5	185	37%
Very Dissatisfied				1		1	0%
Very Satisfied	41	51	66	125	7	290	59%
Total	88	83	97	214	12	494	
Total %	18%	17%	20%	43%	2%		

Expenditure on Top-Up Shopping

As might be expected with the nature of the top-up shop, circa 50% of respondents spend less than €15 on a typical top-up shop. 31% of respondents spend between €15-25 on such shopping.

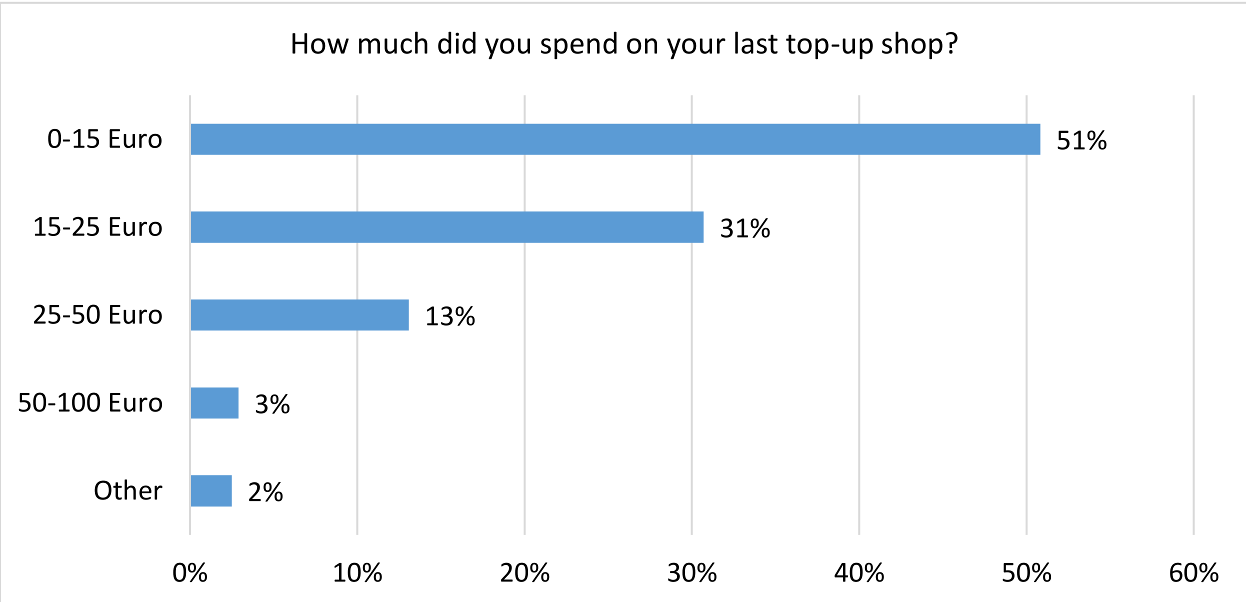


Figure 3.6 Expenditure on Top-Up Shopping

3.3.3 Clothing and Footwear Shopping

The main destinations for clothing and footwear shopping cited by respondents are set out in Figure 3.7 below. Wexford Town is by far the most popular destination for clothing and footwear shopping cited by 62% of all respondents surveyed (as was the case for the Shopper Surveys). Gorey was the second most popular destination, followed by Enniscorthy, a very promising indicator for the health of the clothing and footwear sector in the County. Waterford and Dublin followed as the two most popular out of county retail destinations with total out of county clothing and footwear shopping equating to 13%.

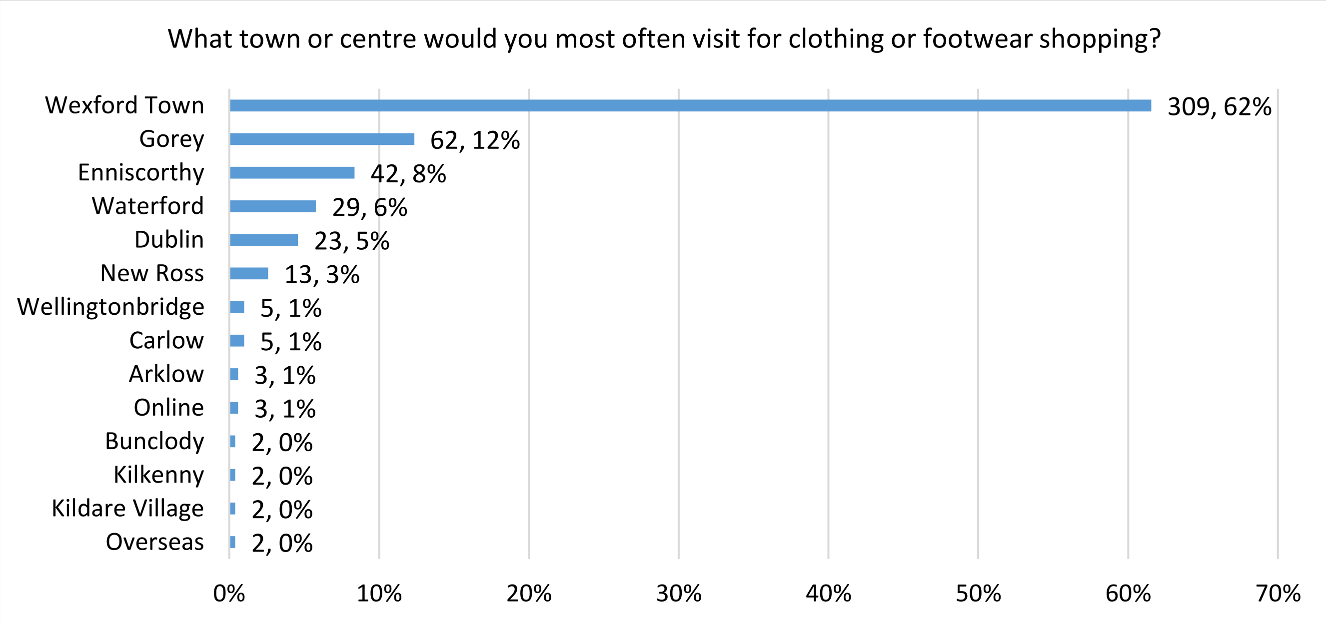


Figure 3.7 Clothing and Footwear Shopping Destination

Table 3.57 Clothing and Footwear Shopping Destination

What town or centre would you most often visit for clothing or footwear shopping?						
Location	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Total	Total %
Wexford Town	54	10	53	192	309	62%
Gorey	3	57		2	62	12%
Enniscorthy	35	5	2		42	8%
Waterford	2	1	24	2	29	6%
Dublin	4	7	4	8	23	5%
New Ross			13		13	3%
Carlow	4	1			5	1%
Welllingtonbridge			5		5	1%
Arklow		3			3	1%
Online		1		2	3	1%

Location	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Total	Total %
Bunclody	2				2	0%
Kildare Village	1			1	2	0%
Kilkenny	1		1		2	0%
Overseas	1		1		2	0%
Total	107	85	103	207	502	
Total %	21%	17%	21%	41%		

Mode of Transport and Frequency of Clothing and Footwear Shopping

An overwhelming majority of respondents travel to clothing and footwear retail destinations by car (88%) with a small number walking (6%) or taking public transport (4%).

Table 3.58 Mode of Transport to Clothing and Footwear Shopping (by destination)

Mode	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	External[12]	Total	Total %
Bus	1			14	4	19	4%
Other		2		2	6	10	2%
Private Car	38	56	18	271	59	442	88%
Train					2	2	0%
Walk	3	4		22	0	29	6%
Total	42	62	18	309	71	502	
Total %	8%	12%	4%	62%	14%		

From the responses clothing and footwear shopping is most commonly carried out once every three months (26.5% or 133 respondents) with only 2.4% of respondents undertaking this type of shopping once a week.

Main Reasons for carrying out Clothes/Footwear Shopping in a Particular Location

County Wexford residents are most likely to shop in a particular destination for clothes and footwear because it is close to home. The second most important trait for attracting

[12] External includes Outside of County (66), Online (3) and Overseas (2).

consumers to shop in a specific location is the choice of goods available (26.5%) followed by the value for money on offer (13.1%). This is summarised in Figure 3.8 overleaf.

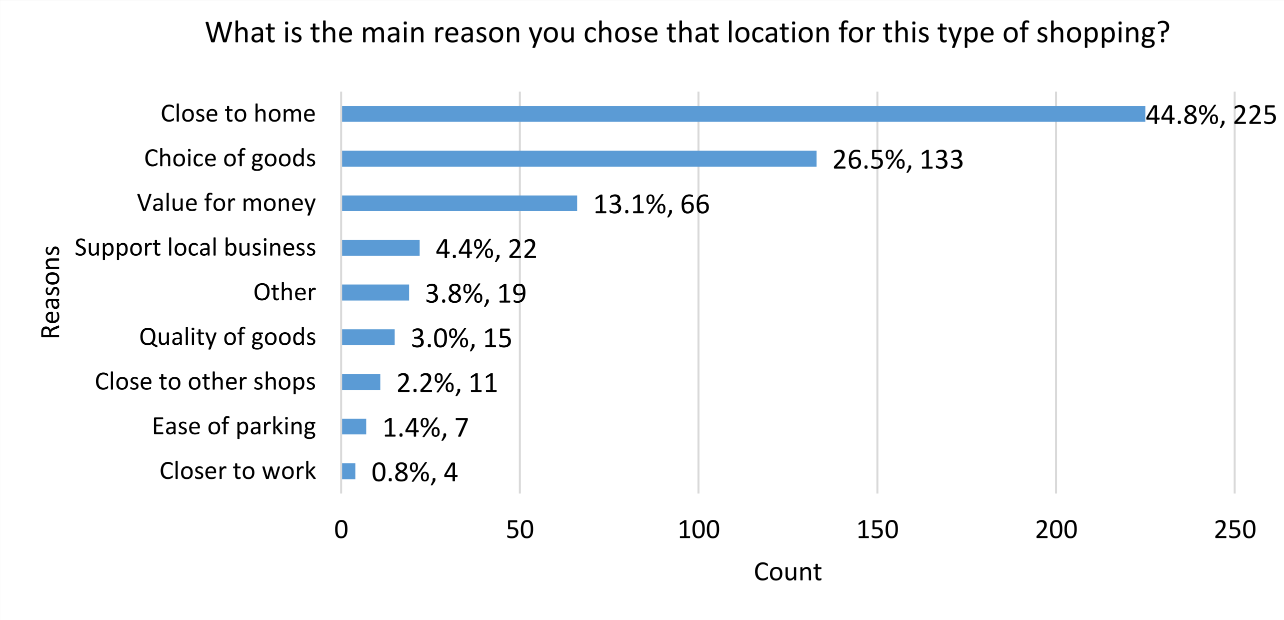


Figure 3.8 Reasons for Shopping at a Particular Location Graph

Satisfaction Levels of Clothing and Footwear Shoppers

Within County Wexford clothing and footwear shoppers are satisfied as a whole with the retail offer for such products. A total of 95% either satisfied or very satisfied with the clothing and footwear experience on offer within the location in which they do this type of shopping.

Table 3.59 Satisfaction Levels of Clothing and Footwear Shoppers (by destination)

Satisfaction	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	External[13]	Total	Total %
Dissatisfied	3			1	0	4	1%
Neutral	2	1	2	14	1	20	4%
Satisfied	20	20	7	130	29	206	41%
Very satisfied	17	41	9	164	41	272	54%
Total	42	62	18	309	71	502	
Total%	8%	12%	4%	62%	14%		

[13] External Including Outside of County (66), Online (3) and Overseas (2).

Expenditure on Clothes and Footwear Shopping

Wexford County resident's average spend on their last shop for clothing and footwear was €137.82. Interestingly the spend by respondents when purchasing such items externally i.e. outside of the County or online is significantly higher (66%) than the County average. However, this could be as a result of planned shopping trips to destinations outside of the County where people are inclined to spend more when it is a location they visit less frequently. Within the County, with Enniscorthy MD witnessed the highest average level of expenditure at €167.86 on the last shop of this shopping type.

Table 3.60 Clothing and Footwear Average spend

How much did you spend on your last shopping trip for clothes & footwear?		
County	€ 137.82	vs County
Enniscorthy MD	€ 167.86	22%
Gorey MD	€ 134.68	-2%
New Ross MD	€ 157.64	14%
Wexford and Rosslare MD	€ 133.17	-3%
External[14]	€ 228.75	66%

3.3.4 Bulky Goods Shopping

Bulky Goods shopping destinations

Wexford Towns importance as the county's major retail centre is reinforced by the number of people identifying the town as their preferred destination for bulky goods (61%). The second most popular shopping destinations for bulky goods is Gorey (17%) followed by Enniscorthy (8%) and then New Ross (7.4%). While broadly positive in terms of the low level of out of county retail leakage (5% of respondents are most likely to carry out their bulky goods shopping at an out of county destinations), the results indicate that New Ross may be underperforming in this regard given that is has a much higher concentration of bulky goods retailers than either Gorey and Enniscorthy. This is summarised overleaf in Figure 3.9.

[14] External Including Outside of County (66), Online (3) and Overseas (2).

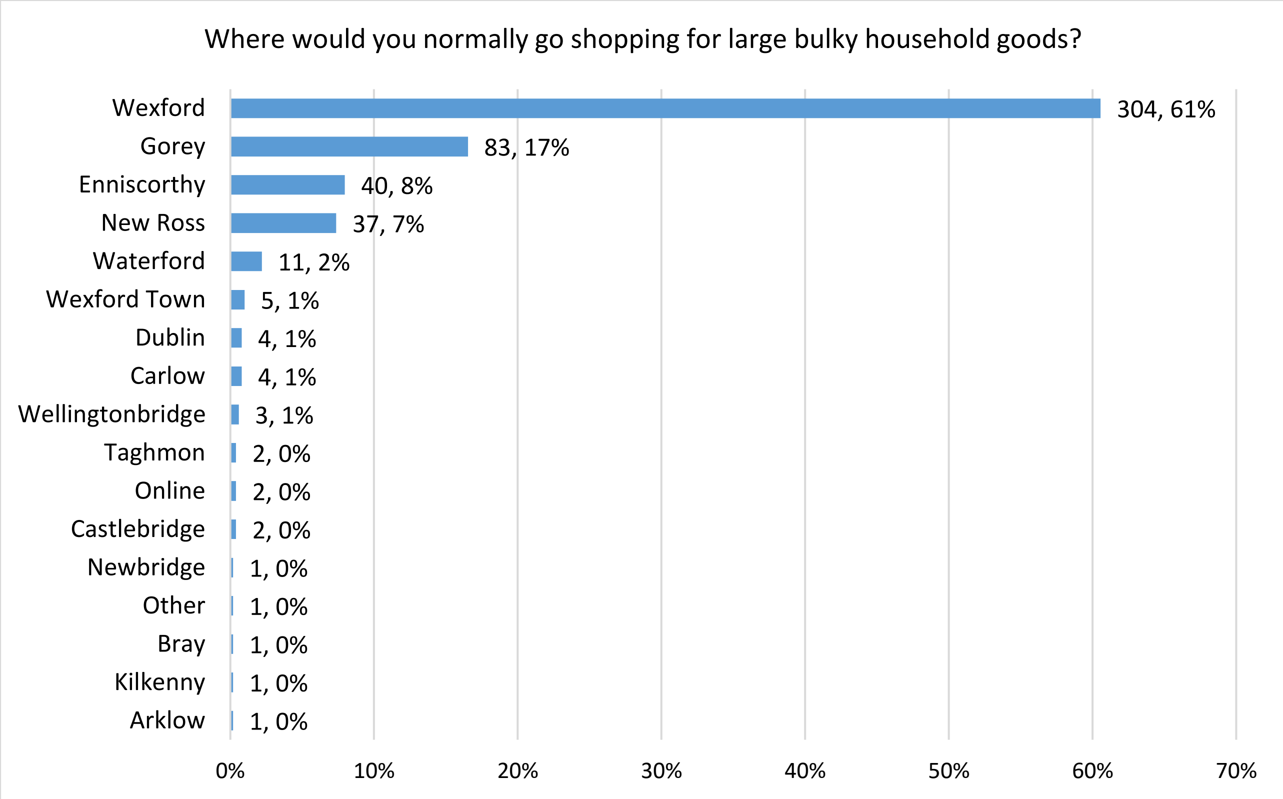


Figure 3.9 Bulky Goods Shopping Destination

Table 3.61 Bulky Goods Shopping Destination

Where would you normally go shopping for large bulky household goods?						
Location	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Total	Total%
Wexford	57	6	49	192	304	61%
Gorey	8	72		3	83	17%
Enniscorthy	36	3	1		40	8%
New Ross			36	1	37	7%
Waterford			7	4	11	2%
Wexford Town			1	4	5	1%
Carlow	3		1		4	1%
Dublin	1	2	1		4	1%
Welllingtonbridge			3		3	1%
Castlebridge			1	1	2	0%
Online	1			1	2	0%
Taghmon			2		2	0%
Arklow		1			1	0%
Kilkenny	1				1	0%
Bray		1			1	0%
Other				1	1	0%
Newbridge			1		1	0%
Total	107	85	103	207	502	
Total%	21%	17%	21%	41%		

Mode of Transport and Frequency of Bulky Goods Shopping

The private car was once again the most popular form of transport for consumers undertaking bulky goods shopping with very few respondents choosing alternative transport modes. In terms of frequency bulky goods tend to be purchased on an ad hoc basis as and when required as indicated by 63% of respondents.

Table 3.62 Mode of Transport to Bulky Goods Shopping

What mode of transport do you normally take for this type of shopping?							
Mode	Enniscorthy	Gorey	New Ross	Wexford and Rosslare MD	Outside of County	Total	Total %
Bus	1		1	3	0	5	1%
Other		2		6	0	8	2%
Private car	33	79	40	290	23	465	93%
Taxi	1				0	1	0%
Walk	5	2	1	12	0	20	4%
Total	40	83	42	311	23	499	
Total %	8%	17%	8%	62%	5%		

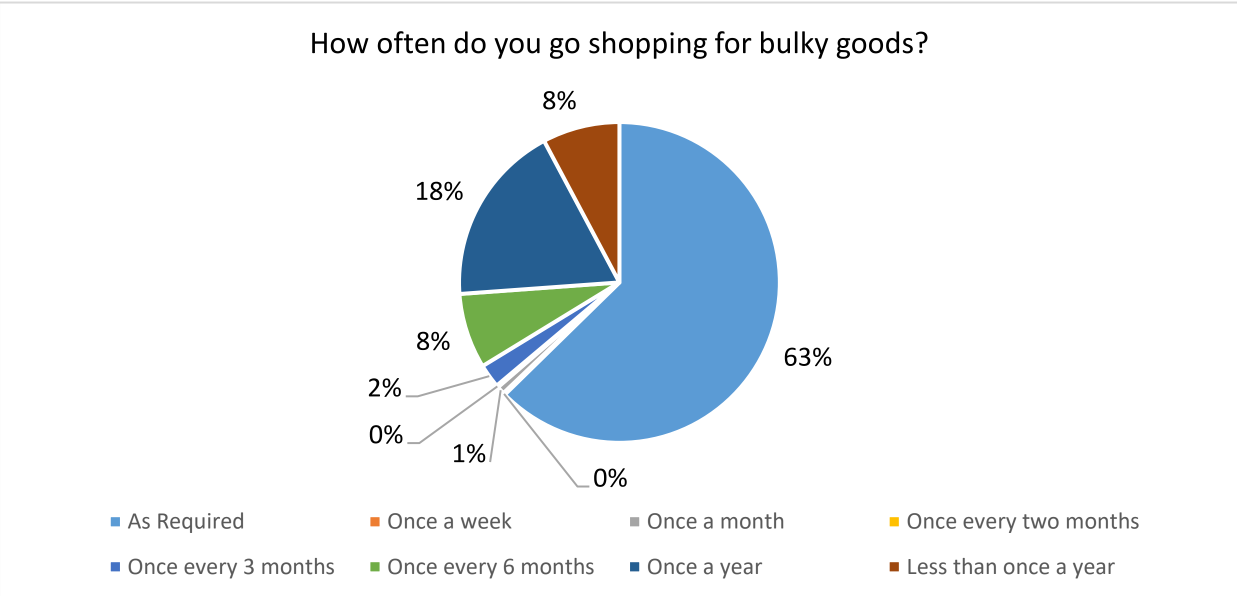


Figure 3.10 Frequency of Bulky Goods Shopping

Main Reasons for carrying out Bulky Goods in a Particular Location

Close to home was again the most common reason that respondents choose a specific location for bulky goods shopping. Value for money and choice of goods are also important to bulky goods consumers.

Table 3.63 Reason for Shopping Bulky Goods in a Particular Location

What is the main reason you do your bulky goods shopping in this location?					
Reason	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	External[15]
Choice of goods	2	4	3	44	4
Close to home	26	37	27	112	3
Close to work	1			3	2
Easy to find parking space		2		3	0
Easy to get to by bus				2	0
Easy to get to by car				14	0
Easy to park near shops		7		14	1
Good Other		1	1	8	2
High quality of shops		2		7	1
Nice shopping environment	2			2	0
Nothing in particular				1	0
Other	3	4	1	27	1
Quality of goods		3	1	7	1
Support local business	3	6	6	23	1
Value for money	3	17	3	44	9
Total	40	83	42	311	25
Total %	8%	17%	8%	62%	5%

Satisfaction Levels of Shoppers

Satisfaction levels as perceived by residents of each Municipal District are quite high with the majority of respondents in all areas saying that they were very satisfied with the bulky goods shopping experience provided by their retail centre of choice.

Table 3.64 Satisfaction Levels for Bulky Goods Shoppers

Satisfaction	Enniscorthy	Gorey	New Ross	Wexford and Rosslare MD	External[16]	Total	Total %
Dissatisfied	2		1	2	1	6	1%
Neutral			2	12	0	14	3%
Satisfied	12	27	19	95	6	159	32%
Very Dissatisfied				1	0	1	0%
Very satisfied	26	56	20	201	18	321	64%
Total	40	83	42	311	25	501	
Total %	8%	17%	8%	62%	5%		

[15] External includes Outside of County (23) and Online (2).
[16] External includes Outside of County (23) and Online (2).

Expenditure on Bulky Goods Shopping

There was a wide variation in the levels of spending of consumers of their last shopping trip for bulky goods, an unsurprising result given the broad nature of goods corresponding to this retail type. The County average spend was €510.71, ranging from €436.88 in Enniscorthy MD to €556.71 in New Ross MD. While the level of spend of respondents in external destinations was considerably higher (63% higher) than the County average, it is important to note that the sample size for this spend is small as it accounts for only 25 of the respondents (23 who travelled out of the County and 2 who purchased the goods online). It is also worth noting that this level of spend on bulky goods is significantly higher than that identified in the Shopper Surveys in Section 3.2.4.

One possible reason for this is that the Shopper Surveys were conducted in the town centres where there is generally a reduced provision of bulky goods outlets. As such consumers are less likely to travel to town centres to purchase bulky goods. Furthermore, with a reduced amount of choice those that do are less likely to have a high spend on such items.

Table 3.65 Expenditure on Bulky Goods Shopping

How much did you spend on your last shopping trip for larger bulky household goods?		
County	€510.71	vs County
Enniscorthy MD	€436.88	-14%
Gorey MD	€551.22	8%
New Ross MD	€556.71	9%
Wexford and Rosslare MD	€503.35	-1%
External	€832.29	63%

3.3.5 Online Shopping

Frequency of Online Shopping

Respondents were also queried on their online purchasing behaviour. Despite an increasing trend towards online shopping, over 58% of respondents stated that they never carry out this type of shopping (Figure 3.11 overleaf). In this regard, it is important to note the likely age range of respondents with landline telephones most typically associated with older generations and the younger demographics most likely to carry out online shopping tending to rely on mobile phones[17]. The low level of frequency indicated for online shopping is reflected by the number of people who have carried out online shopping within the last six months – with just 37.8% indicated that they have done so (Figure 3.12 overleaf).

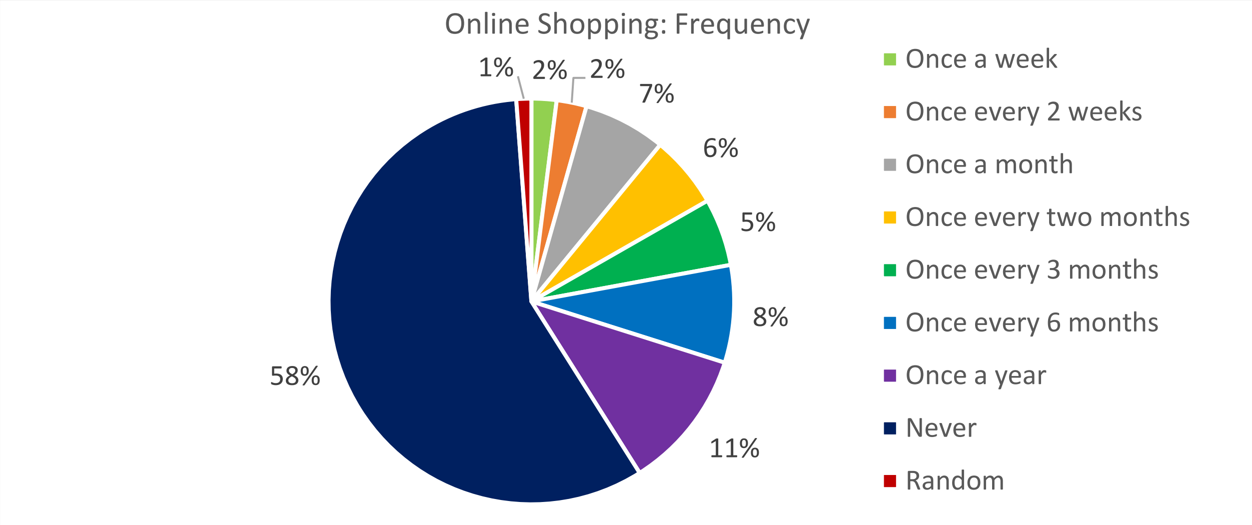


Figure 3.11 Frequency of Online Shopping

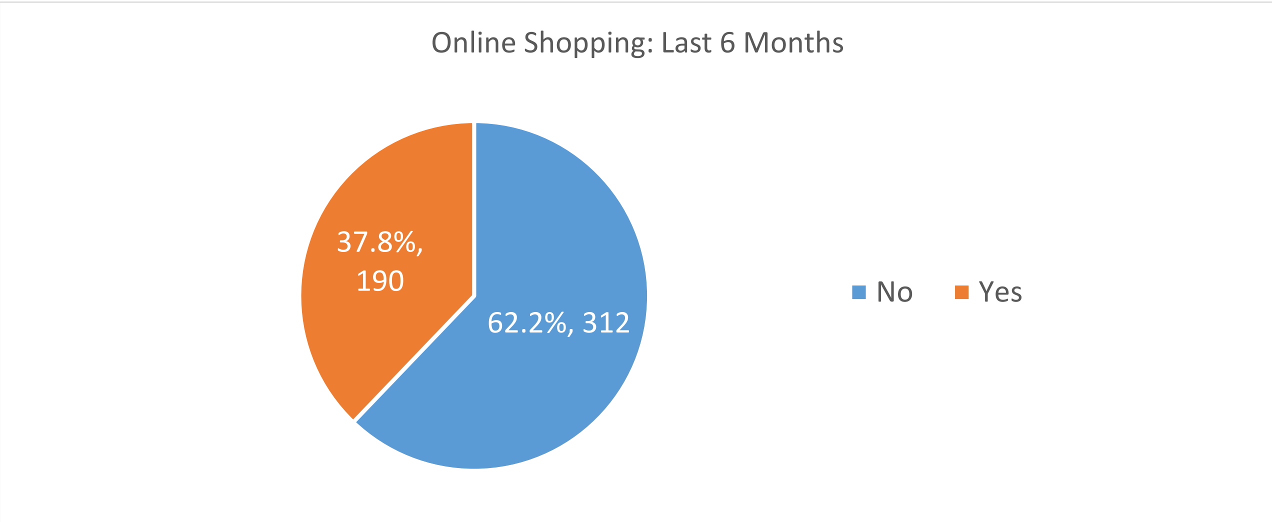


Figure 3.12 Online Shopping Last 6 months

[17] According to the results of a European Consumer Centre Ireland survey on Online Shopping undertaken in November 2017, the 18 to 24 age group were the biggest online shoppers (92%), followed by the 45 to 53 age group (87.14%), the 35 to 44 age group (82.61%), the 25 to 34 age group (78.95%), the 55 to 64 age group (67.14%) and finally the 65 plus (46.30%). Source: https://www.eccireland.ie/ecc-ireland-survey-73-consumers-shopped-online-44-not-confident-about-rights/.

Items purchased online

According to the survey results, clothing and footwear is most likely to be purchased online followed by books and electrical items.

Table 3.66 Items Purchased Online

Which of the following items have you purchased online?		
Online Shopping Items	Total	Total%
Books	37	17%
CD's/Videos/DVD's	2	1%
Clothing or Footwear	103	48%
Don't know or can't remember	1	0%
Electrical Items	23	11%
Food & Grocery	17	8%
Holidays	9	4%
Other	18	8%
Sports Goods	3	1%
Total	213	100%

Expenditure on Online Shopping

The average expenditure of the respondents last online purchases in County Wexford was €141.24, ranging from €83.81 in New Ross MD to €182.41 in Wexford and Rosslare MD.

Table 3.67 Average Spend of all Respondents – Online Shopping

How much was your last online purchase?	
Location	Average Spend of all Respondents
Wexford County	€141.24
Wexford and Rosslare MD	€182.41
New Ross MD	€83.81
Enniscorthy MD	€139.14
Gorey MD	€117.31

Main reason for choosing to do online shopping

The biggest draw for online shopping is the wider choice on offer as stated by 61% of respondents. Convenience is also a factor in terms of the time and energy saved by online shopping. This is summarised overleaf in Figure 3.13.

Figure 3.13 Reasons for Online Shopping

Would you consider purchasing goods online from local suppliers?

Just 25.5% of respondents stated that they would consider purchasing goods online from local suppliers. A possible reason for this may again relate to the likely age range of the majority of respondents, assumed to be within the older demographic or it may just be that they would travel to the shop rather than purchase online.

Figure 3.14 Likelihood of purchasing goods online from local suppliers

3.3.6 Shops where you live

Satisfaction with the range of quality of shopping where you live

The survey sought to elicit the overall satisfaction levels of respondents with the range and quality of shopping available in the area in which they live. Overall, the results are positive with 64% indicating that they are very happy and under 10% expressing dissatisfaction.

Table 3.68 Shops Where you Live Satisfaction

Thinking of the area where you live, are you happy with the range and quality of the shopping you can get to?					
Opinion	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Total %
Don't know/No opinion				2	0%
Fairly dissatisfied	14	3	15	8	8%
Things are alright	35	9	32	54	26%
Very dissatisfied	5	1	3		2%
Very happy	53	72	53	143	64%
Total	107	85	103	207	100.0%
Total %	21.3%	16.9%	20.5%	41.2%	

Improvements: Travel/Parking

Greater parking provision is the main improvement that respondents would like to see in terms of travel and parking for shopping across the County.

Table 3.69 Improvements: Travel and Parking

Travel/Parking Improvements					
Improvement	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Total
Better access by car	0%	0%	0%	1%	0%
Better links form car parks to town centre	0%	1%	0%	2%	1%
Better/more frequent bus service	7%	13%	16%	16%	13%
Better/new train system	0%	0%	1%	2%	1%
Cheaper parking	17%	10%	18%	11%	13%
Free parking	33%	22%	24%	21%	25%
More parking provision	41%	51%	40%	44%	44%
More/Other around town centre	2%	1%	0%	4%	2%

Improvements: Shopping

A covered shopping centre was cited as the primary improvement that could be made across all four MDs, including Gorey MD which currently benefits from such a facility in Gorey Town. More department stores and larger shops is another one of the main improvements identified by respondents.

Table 3.70 Improvements: Shopping

Shopping Improvements					
Improvement	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Total
Covered food market	3%	12%	3%	7%	6%
Covered shopping centre	31%	21%	38%	36%	33%
Department stores/ larger shops	21%	21%	33%	13%	20%
Fewer empty shops/vacancies	16%	9%	7%	26%	17%
More clothes & fashion shops	16%	19%	8%	5%	10%
More discount stores/cheaper goods	5%	14%	7%	7%	7%
More quality/designer shops	9%	5%	4%	7%	6%

Improvements: Facilities

In terms of facilities, people would like to see more public toilets and a greater provision of facilities for people with disabilities.

Table 3.71 Improvements: Facilities

Facilities Improvements					
Improvement	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Total
Better security /CCTV/police presence	10%	23%	21%	24%	20%
Crèche	2%	4%	4%	5%	4%
More facilities for children	10%	9%	9%	9%	9%
More facilities for people with disabilities	25%	30%	20%	24%	24%
More seating areas/benches	19%	12%	20%	8%	13%
More toilets	35%	23%	26%	31%	29%

Improvements: Entertainment

With regard to entertainment, respondents would like to see more leisure attractions though again most people surveyed by phone did not specify a particular improvement. Table 3.72 overleaf summarises this in further detail.

Table 3.72 Improvements: Entertainment

Entertainment Improvements					
Improvement	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Total
More bars/nightclubs	0%	3%	5%	0%	2%
More cafes	18%	10%	19%	19%	17%
More cash machines	7%	21%	5%	15%	12%
More leisure attractions	54%	33%	39%	34%	40%
More promotions/events	5%	26%	16%	22%	17%
More restaurants	16%	8%	16%	10%	13%

3.3.7 Household Survey Summary

The Household Surveys indicate that respondents in County Wexford do not travel far for grocery shopping with 68% citing 'Close to Home' as the main reason they conduct their shopping in a particular location. The majority of respondents spend between €50-€200 on their main grocery shop. Retail leakage for both the main and top-up grocery shops is limited with a combined 4% of respondents conducting such shops outside of the County.

The Household Surveys also queried the online purchasing behaviour of the respondents. Despite an increasing trend towards online shopping, over 58% of respondents stated that they never carry out this type of shopping. In this regard, it is important to note the likely age range of respondents with landline telephones most typically associated with older generations and the younger demographics most likely to carry out online shopping tending to rely on mobile phones.

The low level of frequency indicated for online shopping is reflected by the number of people who have carried out online shopping within the last six months, with just 37.8% indicated that they have done so.

Leakage

A summary overview of the Household Survey results on leakage organised by type of retail is provided below:

- A very low level of out of county retail leakage is apparent for convenience shopping with the main grocery shop and top-up grocery shopping accounting for 2.5%.
- The most significant level of retail leakage is for clothing and footwear shopping, where 14% of the respondents conduct this outside the county, spending on average 66% (€228.75) more than the average in county spend on such items.
- Only 5% of respondents conduct their furniture or bulky goods shopping outside of the county, however, as with the expenditure on clothing and footwear, these respondents spend 63% (€832.29) more than the average in county spend on such items.

3.4 Online Survey Results

The purpose of the online surveys was to further add to the robustness of the retail surveys as a whole. Given the popularity of online shopping it is necessary to consider the habits of consumers in this regard while providing a way to access additional respondents who were not captured in either the Shopper or Household surveys previously discussed in Section 3.2 and 3.3. The response rate (776 respondents) is considered to be very high and thus providing a statistically robust set of data.

3.4.1 Characteristics of Respondents

Table 3.73 Age Distribution of Respondents

What age group are you in?		
Age Group	Number	%
15-24 years old	9	1%
25-34 years old	50	6%
35-44 years old	173	22%
45-54 years old	250	32%
55-64 years old	174	22%
64-74 years old	100	13%
75+ years old	19	2%
Total	775	100%

Table 3.74 Residency of Respondents

Are you a resident of County Wexford?	
District	%
Enniscorthy MD	26.3%
Gorey MD	15.5%
New Ross MD	17.3%
Wexford and Rosslare MD	40.9%
Total	100%

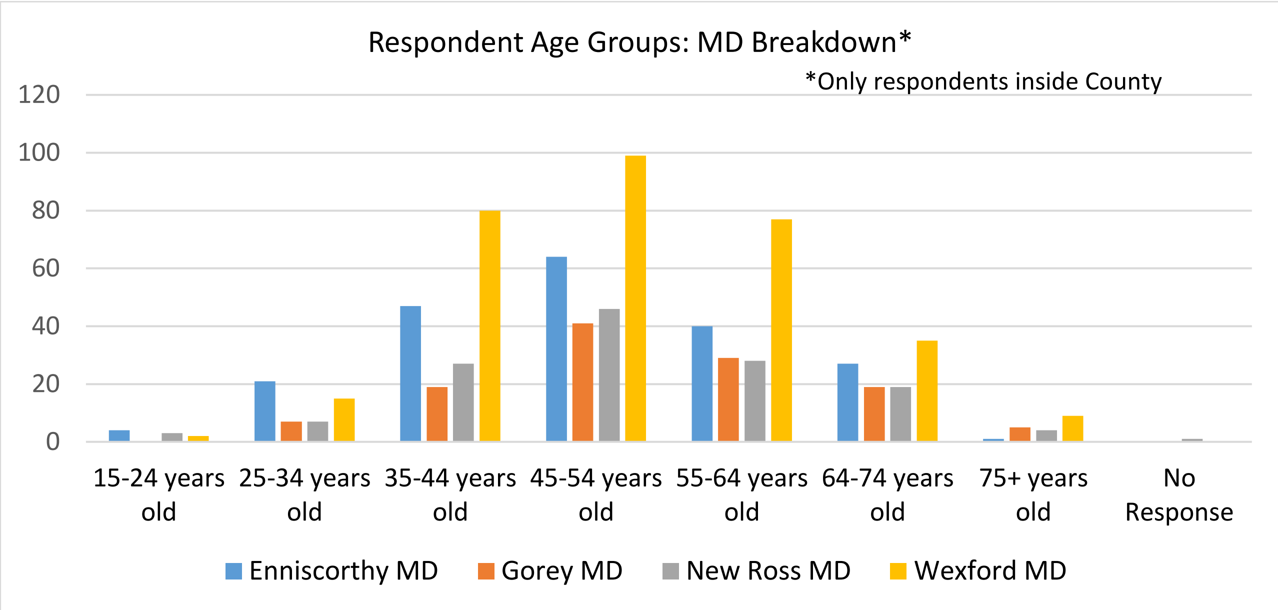


Figure 3.15 Respondents Age Groups: MD Breakdown

3.4.2 Main Grocery Shopping

Wexford town was the most referenced centre for the main grocery shop at 47%, followed by Enniscorthy at 22%. This may be reflective of the fact that the highest and second highest number of respondents to the online surveys were characterised as residents of Wexford and Enniscorthy respectively.

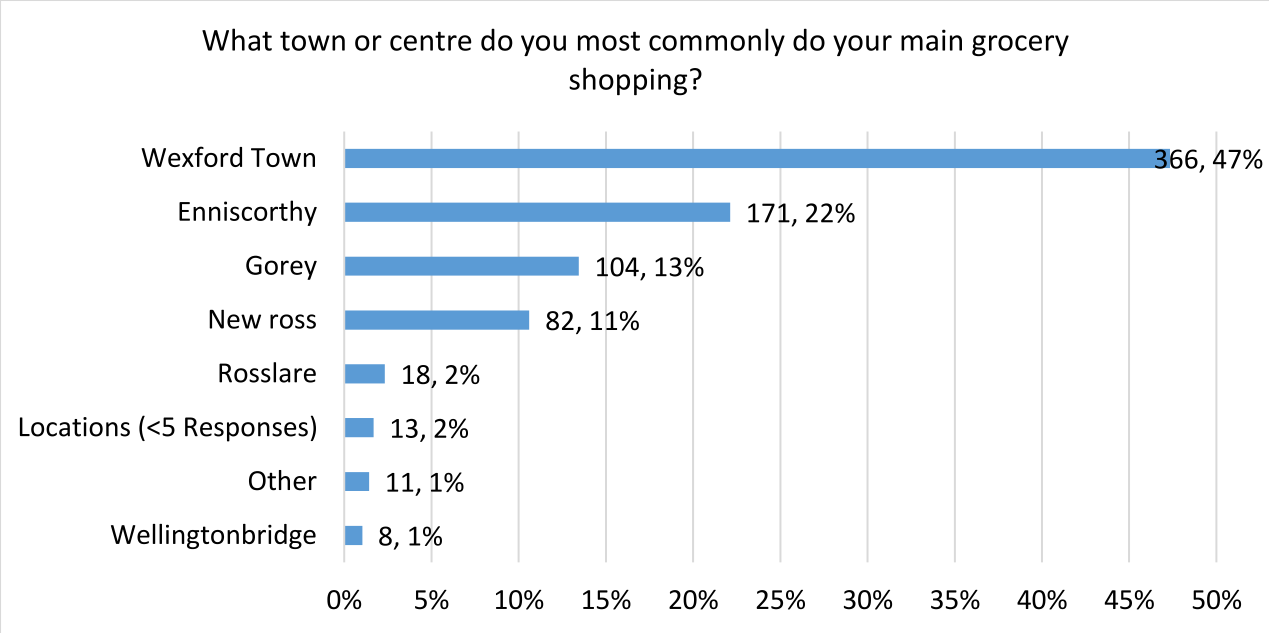


Figure 3.16 Town Centre Most visited for Main Grocery Shop

Choice and variety (29%) and accessibility (22%) were the primary attractions for shopping in a particular location for respondents, followed by the presence of specific retail types and parking provision. Support for local businesses and loyalty measured lowly amongst respondents as an attractor.

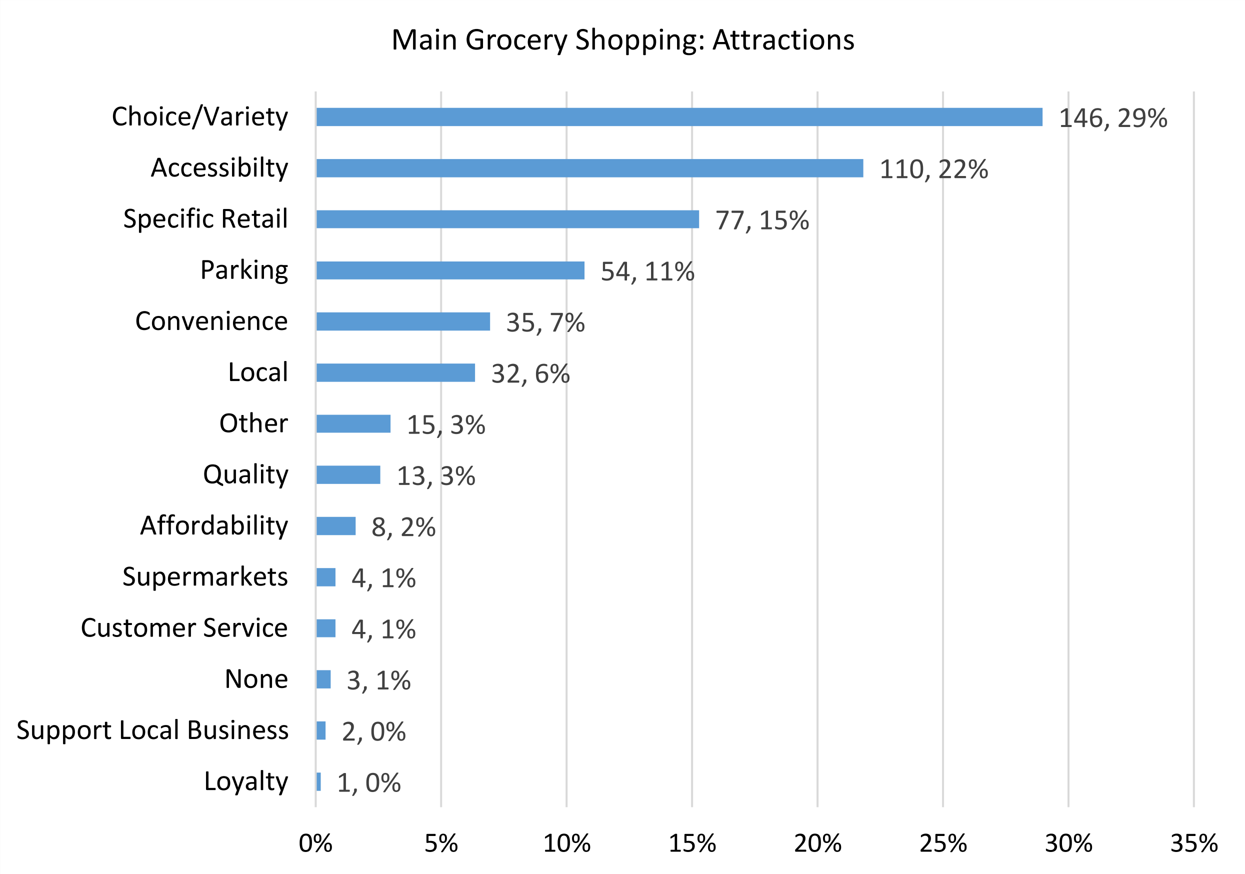


Figure 3.17 Main Grocery Shop Town: Attractions

High levels of respondents in both Wexford and Gorey were either satisfied or very satisfied with the towns in which they did their main grocery shop. Enniscorthy's levels of satisfaction were lower in comparison, with 12% of respondents being dissatisfied and 18% having a neutral experience.

Table 3.75 Main Grocery Shop: Satisfaction Levels

How satisfied are you with your experience of doing your main grocery shop in this town?							
Satisfaction	Enniscorthy	Gorey	New Ross	Wexford Town	External	Total	Total%
Dissatisfied	20		5	5	0	30	4%
Neutral	31	5	14	23	2	75	10%
Satisfied	62	26	43	160	7	298	39%
Very satisfied	58	75	29	192	7	361	47%
Total	171	106	91	380	16	764	
Total%	22%	14%	12%	50%	2%		

37% of the online respondents cited parking as the primary improvement that could be made to the location in which they do their main grocery shop. The next most popular response was a requirement for traffic management within the location at 8%, followed by 'none' at 7% which perhaps suggest that a high proportion of respondents are content with the facilities currently experienced in the location they do the main grocery shop.

Table 3.76 Main Grocery Shop Location: Improvements

What improvement to this town would encourage you to visit or do your main grocery shop there more than your currently do?		
Improvement	Number	%
Parking	241	37%
Traffic Management	54	8%
None	49	7%
Supermarket	31	5%
Brands	22	3%
Roads	21	3%
Choice	20	3%
Affordability	18	3%
More Shops	17	3%
Accessibility	15	2%
Shopping Centre	14	2%
Other	13	2%
Specialist Shops	13	2%
Variety	12	2%
Local Produce/Independent Shops	10	2%
Improvement (<10 responses)	107	16%
Total	657	100%

Respondents who undertook the online survey indicated that they tend to do their main grocery shop 3 times per month (52%), with once per week being the second most common answer (39%). This is summarised overleaf in Figure 3.18.

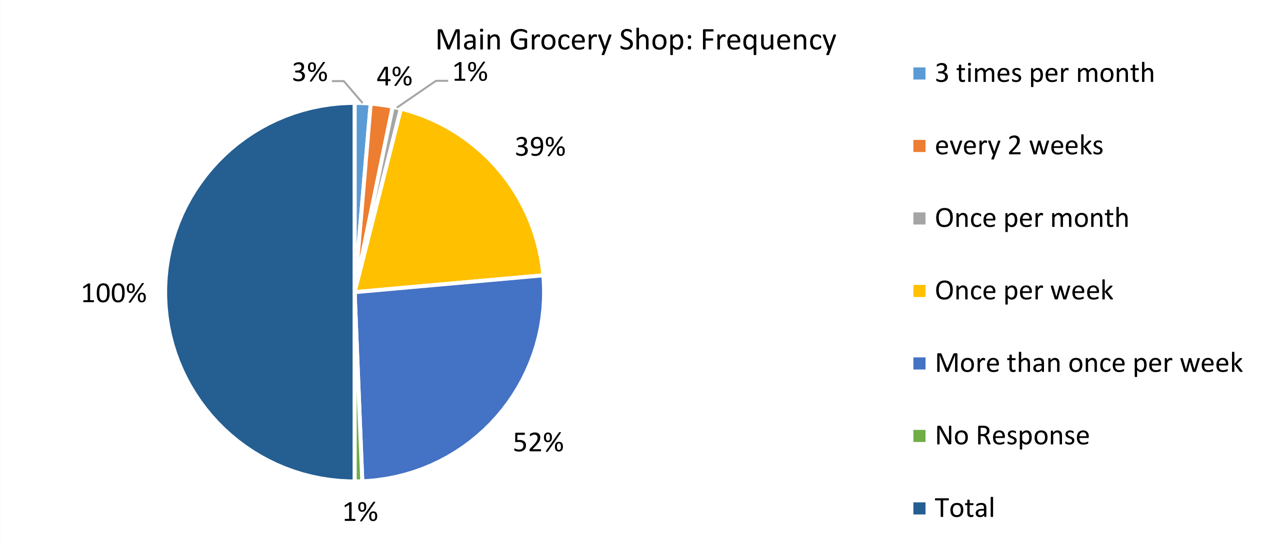


Figure 3.18 Main Grocery Shop Frequency

Private transport by way of the car was overwhelmingly cited as the most commonly used mode of transport when respondents are undertaking their man grocery shop. With 93% of Enniscorthy, 92% of Gorey, 99% of New Ross and 97% of Wexford residents all utilising this form of transport.

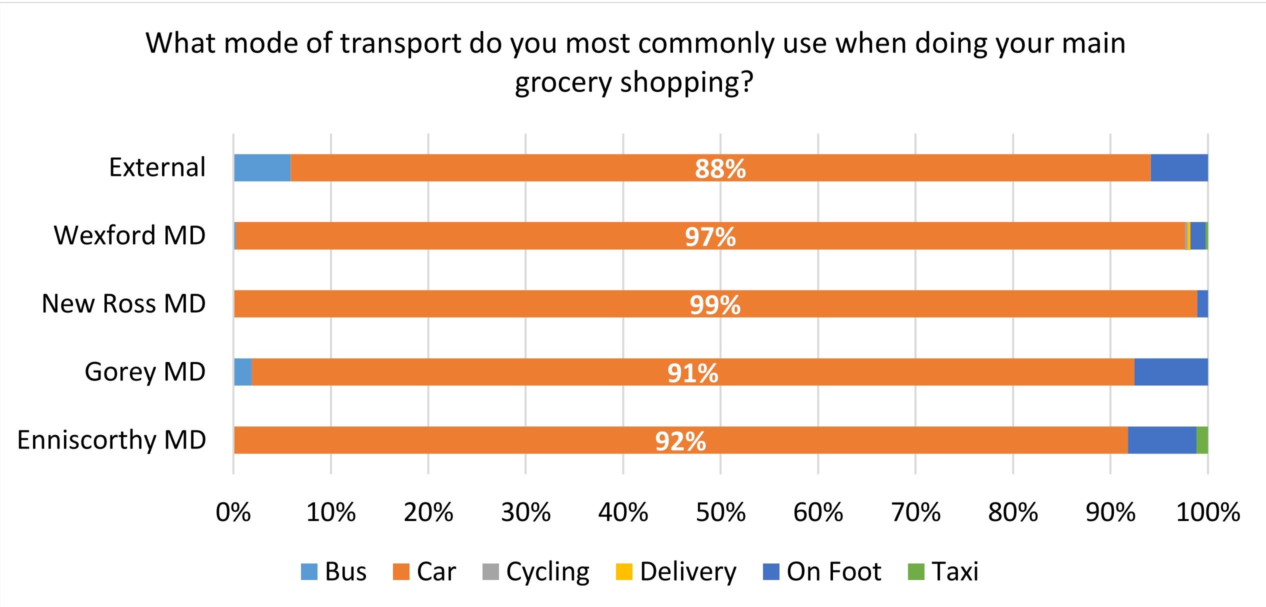


Figure 3.19 Main Grocery Shop: Mode of Transport

The average spend on the main grocery shop from the Online Surveys was highest in New Ross, being 3% above the average County spend. It was lowest in Gorey being slightly below the County average. Those respondents from the Online Survey who did their last main grocery shop out of County (noted as external) spent 1% less than the County average.

Table 3.77 Main Grocery Shop: Average Spend

Roughly how much did you spend on your main grocery shop on your last visit?		
MD	€ 103.15	vs County
Enniscorthy	€ 99.04	-4%
Gorey	€ 102.76	0%
New Ross	€ 106.59	3%
Wexford Town	€ 104.25	1%
External	€ 102.34	-1%

3.4.3 Top-Up Shop

Wexford town was the most referenced centre for the top-up grocery shop at 34%, followed by Enniscorthy at 17%. This may be reflective of the fact that the highest and second highest number of respondents to the online surveys were characterised as residents of Wexford and Rosslare MD and Enniscorthy MD respectively.

Table 3.78 Town Centre Most visited for Top-Up Grocery Shop

What town or centre do you most commonly do your 'top-up' grocery shopping?		
Location	Number	%
Wexford Town	247	34%
Enniscorthy	124	17%
Gorey	76	10%
New Ross	48	7%
Rosslare	25	3%
Wellington bridge	24	3%
Bunclody	21	3%
Castlebridge	20	3%
Bridgetown	14	2%
Ramsgrange	13	2%
Ferns	12	2%
St. Aidans	12	2%
Piercestown	11	1%
Location (<10)	90	12%
Total	737	100%

Accessibility (31%) and convenience (21%) were highlighted as the primary attractions for respondents to visit their destination of choice for the purposes of conducting their top-up shop. Customer Service and supporting local businesses were less important factors for this purpose. This is summarised overleaf in Table 3.79.

Table 3.79 Top-Up Grocery Shop Attractions

What are the main attractions of town or village to do your 'top-up' grocery shop?		
Attraction	Number	%
Accessibility	224	31%
Convenience	152	21%
Choice	75	10%
Parking	75	10%
None	27	4%
Variety	23	3%
Affordability	22	3%
Low Cost Supermarket	22	3%
Quality	21	3%
Customer Service	11	2%
Support Local Businesses	11	2%
Attraction (<10)	55	8%
Total	718	100%

High levels of respondents in the County were either Satisfied or Very Satisfied (81%) with the towns in which they conduct their top-up shop. Wexford and Rosslare MD had the highest response rate of Very Satisfied top-up shoppers at 46%, with Enniscorthy having the highest level of dissatisfied top-up shopper, but at a relatively low rate of 11%.

The breakdown of the satisfaction levels at County and MD levels is illustrated in Tables 3.80 – 3.81 below.

Table 3.80 Top-up Shop: Satisfaction Levels Wexford County

Top-Up Satisfaction: Wexford County		
Satisfaction	Number	%
Dissatisfied	25	4%
Neutral	94	13%
Satisfied	264	37%
Very satisfied	313	44%
No Response	15	2%
Total	711	100%

Table 3.81 Top-up Shop: Satisfaction Levels by Municipal District

Top-Up Satisfaction: Enniscorthy MD		
Satisfaction	Number	%
Dissatisfied	15	11%
Neutral	36	25%
Satisfied	47	33%
Very satisfied	42	30%
No Response	2	1%
Total	142	100%

Top-Up Satisfaction: Gorey MD		
Satisfaction	Number	%
Dissatisfied	2	2%
Neutral	11	9%
Satisfied	37	31%
Very satisfied	66	55%
No Response	4	3%
Total	120	100%

Top-Up Satisfaction: New Ross MD		
Satisfaction	Number	%
Dissatisfied	3	3%
Neutral	9	8%
Satisfied	49	45%
Very satisfied	47	43%
No Response	1	1%
Total	109	100%

Top-Up Satisfaction: Wexford and Rosslare MD		
Satisfaction	Number	%
Dissatisfied	5	1%
Neutral	38	11%
Satisfied	131	39%
Very satisfied	158	46%
No Response	8	2%
Total	340	100%

Of the online survey's respondents, 61% conduct a top-up shop more than once per week, followed by 28% of respondents conducting such a shop once per week.

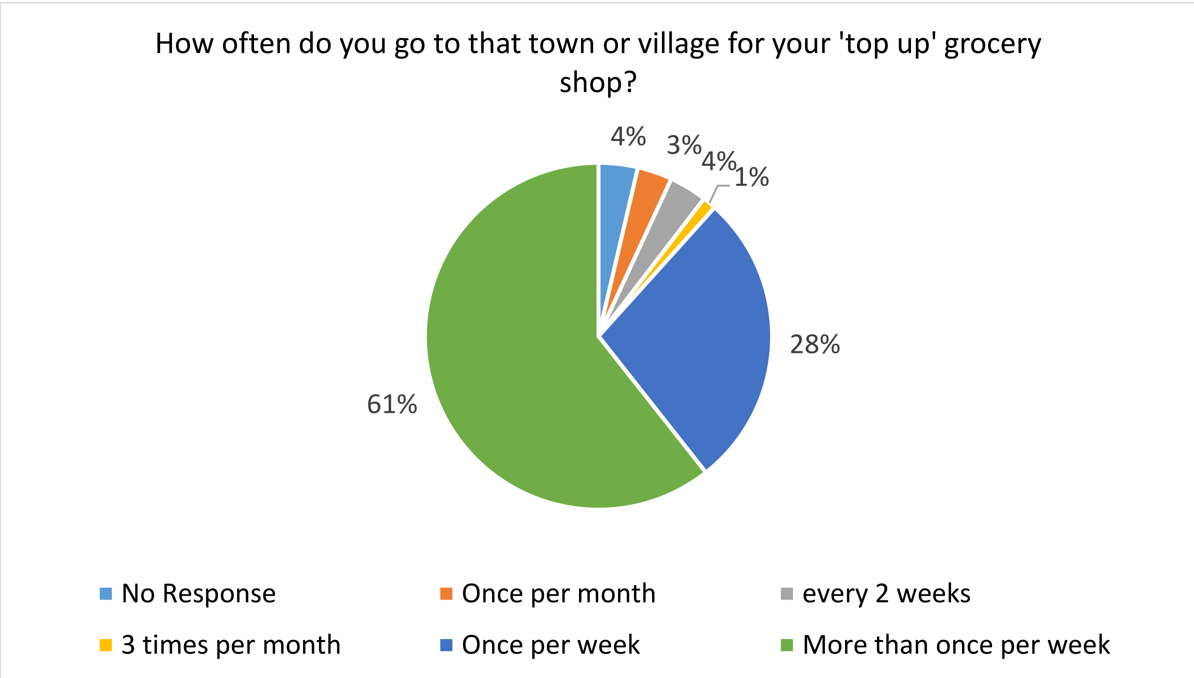


Figure 3.20 Frequency of Top-up Shopping

The car was the most commonly used mode of transport for conducting top-up shopping across the County. On foot was the second most common mode, while only 1% of respondents in Wexford and Rosslare MD using the bus to conduct this type of shopping.

Table 3.82 Top-up Shopping Mode of Transport %

What mode of transport do you most commonly use when doing your 'top-up' grocery shopping?				
Transport	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD
Bus	0%	0%	0%	1%
Car	80%	82%	91%	91%
Cycle	0%	1%	0%	1%
On Foot	12%	15%	8%	6%
Taxi	1%	0%	0%	0%
No Response	6%	3%	1%	2%
Total	100%	100%	100%	100%

The average spend on the top-up grocery shop was highest in New Ross, being 11% above the average County spend. It was lowest in Wexford being 3% below the County average.

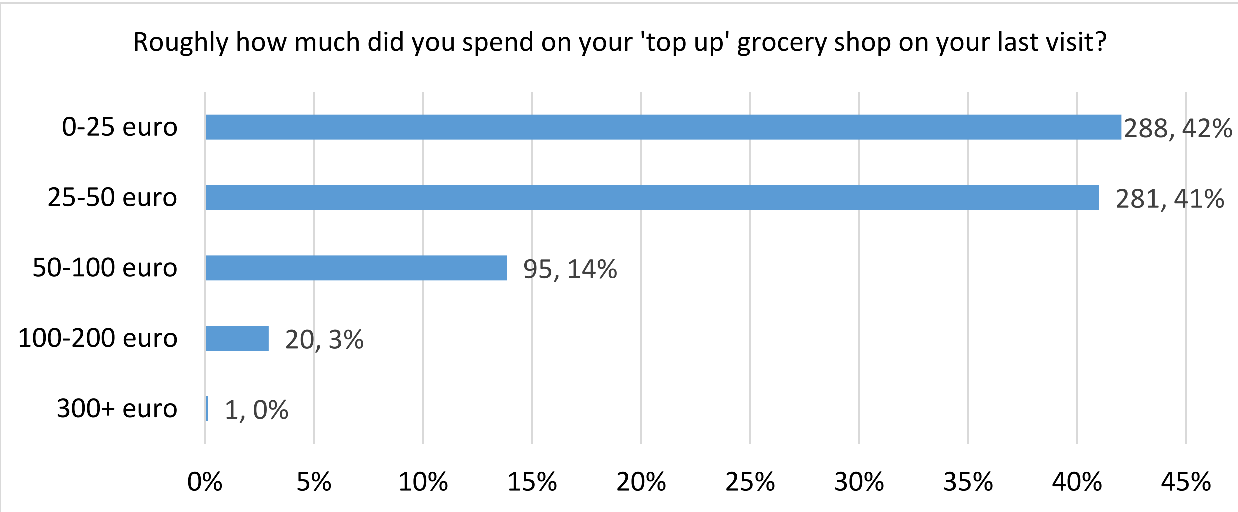


Figure 3.21 Expenditure on Top-Up Shopping

Table 3.83 Top-up Shopping Average Spend

How much did you spend on your 'top-up' grocery shop on your last visit?		
County	€35.78	vs County
Enniscorthy	€35.43	-1%
Gorey	€35.88	0%
New Ross	€39.58	11%
Wexford	€34.64	-3%

3.4.4 Clothing & Footwear

The main destinations for clothing and footwear shopping cited by respondents are set out in Table 3.84. Wexford Town is by far the most popular destination for clothing and footwear shopping cited by 64% of all respondents surveyed (as was the case for the Shopper and Household Surveys). Gorey (9%) was the second most popular destination, followed by Waterford and Dublin at 7% each.

Table 3.84 Clothing and Footwear Shopping Destinations

What town or centre do you normally do your clothes/ footwear shopping?						
Location	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Total	Total%
Arklow	-	5	-	-	5	1%
Bagenalstown	-	1	-	-	1	0%
Blanchardstown	-	-	1	-	1	0%
Bunclody	1	-	-	-	1	0%
Carlow	13	-	-	-	13	2%
Cork	1	-	-	1	2	0%
Dublin	14	13	5	19	51	7%
Dundrum	3	4	-	4	11	1%
Enniscorthy	23	4	-	-	27	3%
Gorey	1-	58	-	1	69	9%
Kildare	1	1	-	1	3	0%
Kilkenny	1	-	-	-	1	0%
N/A[18]	3	2	2	7	14	2%
New Ross	-	-	7	-	7	1%
Online	6	3	3	1-	22	3%
Various	-	1	-	1	2	0%
Waterford	3	-	44	5	52	7%
Wellington Bridge	-	-	1	-	1	0%
Wexford Town	125	28	72	268	493	64%
Total	204	120	135	317	776	
Total %	26%	15%	17%	41%		

[18] "N/A" defined as an Invalid response input from the respondent

Respondents noted Choice (38%) as the primary attraction for conducting their clothing and footwear shopping in a particular destination. This was followed by Variety (20%) and Accessibility (10%).

A 'Named' or branded stores was the next popular reason for visiting a particular location with 5% of respondents citing this as their main reason for visiting a particular centre.

Table 3.85 Clothing and Footwear Shopping Attractions

What are the main attractions of this town for clothing/ footwear shopping?		
Attraction	Number	%
Choice	287	38%
Variety	150	20%
Accessibility	73	10%
Named Store	36	5%
None	31	4%
Convenience	27	4%
Nice Shops	25	3%
Other	25	3%
Affordability	18	2%
Local	18	2%
Boutiques/Brands	13	2%
Parking	10	1%
Quality	10	1%
Attraction <10	24	3%
Total	747	100%

High levels of respondents in the County were either Satisfied or Very Satisfied (74%) with the locations in which they conduct their Clothing and Footwear shop. Gorey MD had the highest response rate of Very Satisfied shoppers at 48%, with Enniscorthy having the highest level of dissatisfied clothing and footwear shoppers, but at a relatively low rate of 15%.

It is notable that there was a significant drop of in responses in both New Ross and Enniscorthy MDs to this question and an increase in respondents to Wexford and Rosslare MD, thus suggesting that there is a significant draw to Wexford and Rosslare MD (Wexford Town) for this type of shopping.

External sources (out of county or online) are also significant influences for respondents when it comes to clothing and footwear shopping. The breakdown of the satisfaction levels at County and MD levels is illustrated in Tables 3.86 – 3.87 below.

Table 3.86 Clothing and Footwear Shopping Satisfaction Levels Wexford County

C&F Satisfaction: Wexford County		
Satisfaction	Number	%
Dissatisfied	28	5%
Neutral	117	20%
Satisfied	268	45%
Very satisfied	174	29%
No Response	10	2%
Total	597	100%

C&F Satisfaction: External[19]		
Satisfaction	Number	%
Dissatisfied	11	7%
Neutral	20	12%
Satisfied	61	37%
Very satisfied	67	41%
No Response	4	2%
Total	163	100%

Table 3.87 Clothing and Footwear Shopping Satisfaction Levels by Municipal District

C&F Satisfaction: Enniscorthy MD		
Satisfaction	Number	%
Dissatisfied	4	15%
Neutral	6	22%
Satisfied	10	37%
Very satisfied	6	22%
No Response	1	4%
Total	27	100%

C&F Satisfaction: Gorey MD		
Satisfaction	Number	%
Dissatisfied	2	3%
Neutral	11	16%
Satisfied	22	32%
Very satisfied	33	48%
No Response	1	1%
Total	69	100%

C&F Satisfaction: New Ross MD		
Satisfaction	Number	%
Dissatisfied		0%
Neutral	3	38%
Satisfied	3	38%
Very satisfied	2	25%
No Response		0%
Total	8	100%

C&F Satisfaction: Wexford and Rosslare MD		
Satisfaction	Number	%
Dissatisfied	22	4%
Neutral	97	20%
Satisfied	233	47%
Very satisfied	133	27%
No Response	8	2%
Total	493	100%

[19] Where previously those shopping ‘externally’ were not included in the main grocery and top-up sections as they accounted for a small number of respondents and were removed for communication of data, in Clothing and Footwear and Bulky goods these account for a more significant portion of the respondents and thus are included. ‘External’ includes out of county and online shopping.

Of the respondents to the online surveys 64% conduct their clothing or footwear shopping once per month. A relatively even split of respondents conduct such shopping between once per week, every two weeks or three times per month. This is illustrated in Figure 3.22 overleaf.

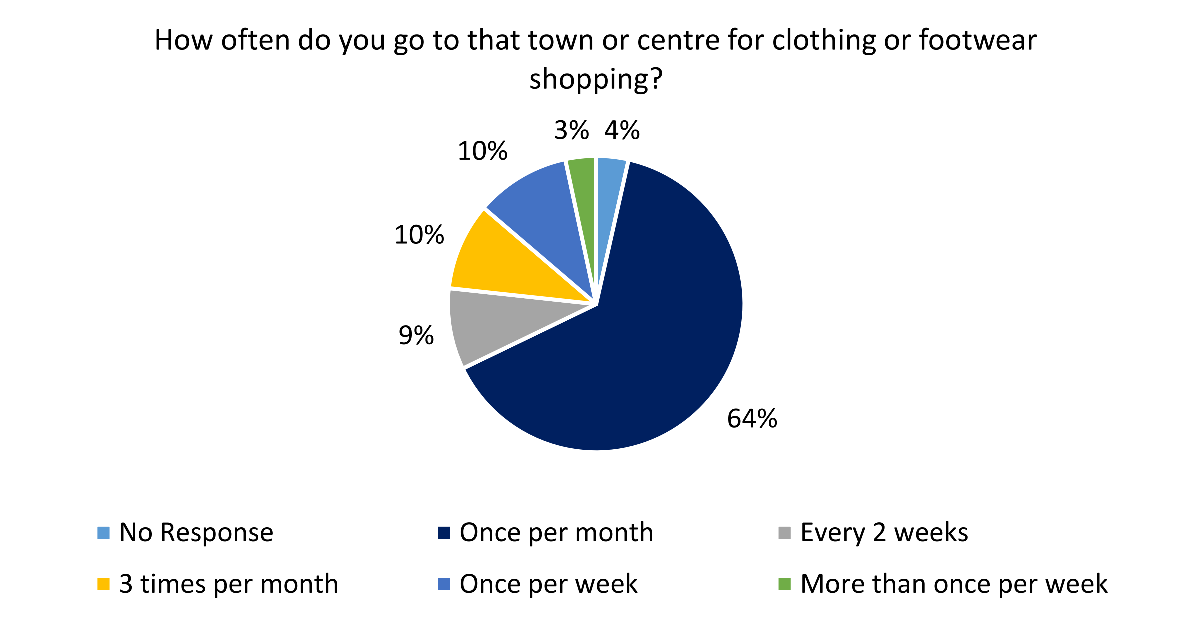


Figure 3.22 Clothing and Footwear Shopping Frequency

The average spend on clothing and footwear shopping was highest in Enniscorthy MD, being 4% above the average County spend. It was lowest in Gorey being 7% below the County average. External out of county or online purchases are significantly higher than the county average indicating that respondents tend to save up to spend more on items purchased via these means.

Table 3.88 Clothing and Footwear Shopping Average Spend (by destination)

Average Amount Spent Per Person		
County	€91.36	vs County
Enniscorthy MD	€94.91	4%
Gorey MD	€84.60	-7%
New Ross MD	€89.06	-3%
Wexford and Rosslare MD	€92.17	1%
External	€120.00	31%

3.4.5 Furniture & Bulky Goods

The Wexford and Rosslare MD was the most referenced location for furniture and bulky good shopping at 47%, followed by Dublin at 13%, which indicates that there is relatively high proportion of leakage outside of the County to the north with regard to furniture and bulky goods shopping. This is set out in Table 3.89 overleaf.

#Table 3.89 Furniture and Bulky Goods Shopping Destinations

What town or centre do you normally do your furniture or bulky goods shopping?						
Location	Enniscorthy MD	Gorey MD	New Ross MD	Wexford and Rosslare MD	Total	Total %
Carlow	4	1	0	1	6	1%
Dublin	30	24	11	32	97	13%
Enniscorthy	25	2	0	1	28	4%
Gorey	11	49	0	1	61	8%
Kildare	0	1	0	0	1	0%
Kilkenny	1	0	0	1	2	0%
Limerick	1	0	0	0	1	0%
New Ross	3	0	39	6	48	6%
Online	13	6	4	13	36	5%
Waterford	3	0	25	11	39	5%
Wexford and Rosslare MD	85	16	46	214	361	47%
Wicklow	1	5	0	0	6	1%
None	7	2	1	1	11	1%
No Response	7	8	4	20	39	5%
N/A (Invalid Response)	13	6	5	16	40	5%
Total	204	120	135	317	776	
Total %	26%	15%	17%	41%		

Choice was noted by 35% of respondents as being the main reason for conducting bulky goods/furniture shopping in a particular destination. This was followed by accessibility (23%) and variety (8%).

Table 3.90 Furniture and Bulky Goods Shopping Attractions

What are the main attractions of this town for furniture/ bulky goods shopping?		
Attraction	Number	%
Choice	224	35%
Accessibility	150	23%
Variety	52	8%
Affordability	42	7%
Convenience	38	6%
Other	34	5%

Delivery	26	4%
Quality	24	4%
None	13	2%
Availability	11	2%
Attraction <10	27	4%
Total	641	100%

High levels of respondents in the County were either Satisfied or Very Satisfied (70%) with the locations in which they conduct their Furniture and Bulky shop, with only 3% dissatisfied. Gorey MD had the highest response rate of Very Satisfied shoppers at 44%. Enniscorthy MD has a relatively low response rate to this question as compared to External (Out of County/Online). This suggests that respondents tend not to purchase bulky goods in Enniscorthy and either travel out of County or go online. The breakdown of the satisfaction levels at County and MD levels is illustrated in Tables 3.91 – 3.92 below.

Table 3.91 Furniture and Bulky Goods Shopping Satisfaction Levels Wexford County

Bulky Satisfaction: County		
Satisfaction	Number	%
Dissatisfied	14	3%
Neutral	118	24%
Satisfied	219	44%
Very satisfied	129	26%
No Response	16	3%
Total	496	100%

Bulky Satisfaction: External[20]		
Satisfaction	Number	%
Dissatisfied	20	11%
Neutral	30	16%
Satisfied	71	37%
Very satisfied	61	32%
No Response	8	4%
Total	190	100%

Table 3.92 Furniture and Bulky Goods Shopping Satisfaction Levels by Municipal District

Bulky Satisfaction: Enniscorthy		
Satisfaction	Number	%
Dissatisfied	2	8%
Neutral	4	15%
Satisfied	9	35%
Very satisfied	10	38%
No Response	1	4%
Total	26	100%

Bulky Satisfaction: Gorey		
Satisfaction	Number	%
Dissatisfied	1	2%
Neutral	5	8%
Satisfied	26	43%
Very satisfied	27	44%
No Response	2	3%
Total	61	100%

[20] Where previously those shopping ‘externally’ were not included in the main grocery and top-up sections as they accounted for a small number of respondents and were removed for communication of data, in Clothing and Footwear and Bulky goods these account for a more significant portion of the respondents and thus are included. ‘External’ includes out of county and online shopping.

Bulky Satisfaction: New Ross		
Satisfaction	Number	%
Dissatisfied		0%
Neutral	11	23%
Satisfied	24	50%
Very satisfied	12	25%
No Response	1	2%
Total	48	100%

Bulky Satisfaction: Wexford and Rosslare MD		
Satisfaction	Number	%
Dissatisfied	11	3%
Neutral	98	27%
Satisfied	160	44%
Very satisfied	80	22%
No Response	12	3%
Total	361	100%

Of the respondents to the online surveys 93% conduct a furniture or bulky shop once per month. This high number of respondents for such once per month is as expected given the nature of such shopping which is generally considered to be less essential than other forms of shopping.

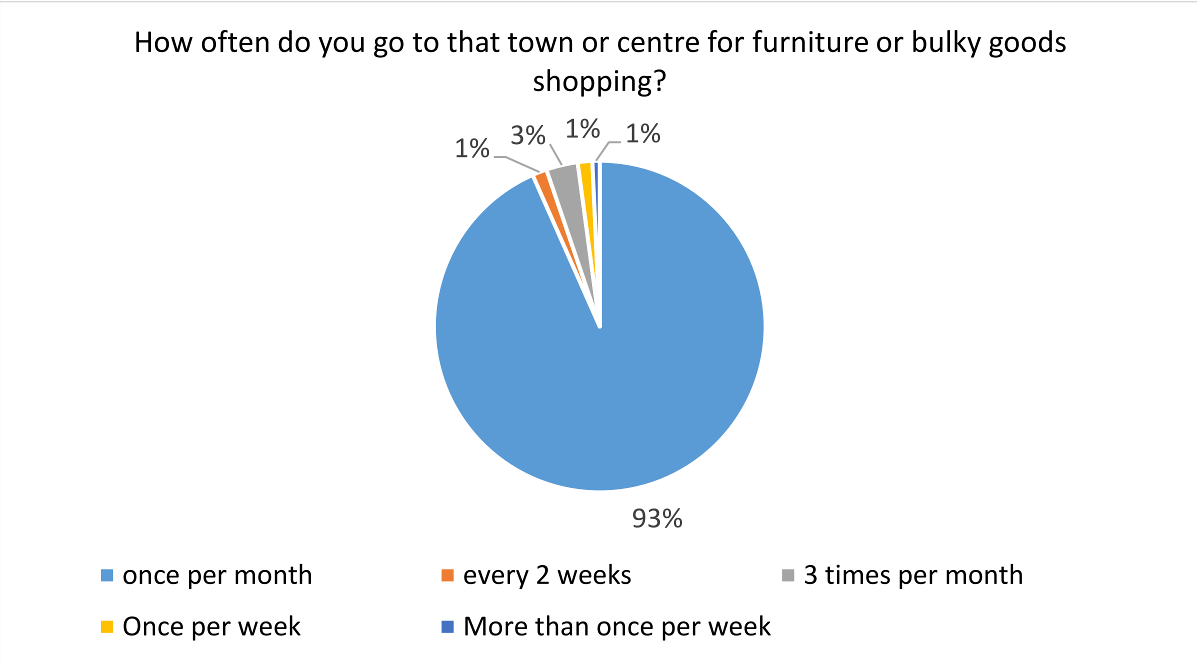


Figure 3.23 Frequency of Furniture and Bulky Goods Shopping

The average in County spend on furniture or bulky shopping was highest in New Ross MD, being 4% above the average County spend. It was lowest in Gorey being 2% below the County average. Again, External is a significant factor in this type of shopping with the average spend for bulky good either out of county or online being 14% higher than the County average.

Table 3.93 Furniture and Bulky Goods Shopping Average Spend

Average Expenditure		
County	€ 181.90	vs County
Enniscorthy MD	€ 171.00	-6%
Gorey MD	€ 178.73	-2%
New Ross MD	€ 189.44	4%
Wexford and Rosslare MD	€ 182.24	0%
External MD	€ 207.26	14%

3.4.6 Online Shopping

Over 80% of respondents in all four MDs had conducted shopping online within the six months preceding the survey. This high proportion of respondents is perhaps unsurprising given that it relates to respondents who have conducted an online survey who may be more likely to engage in online activity.

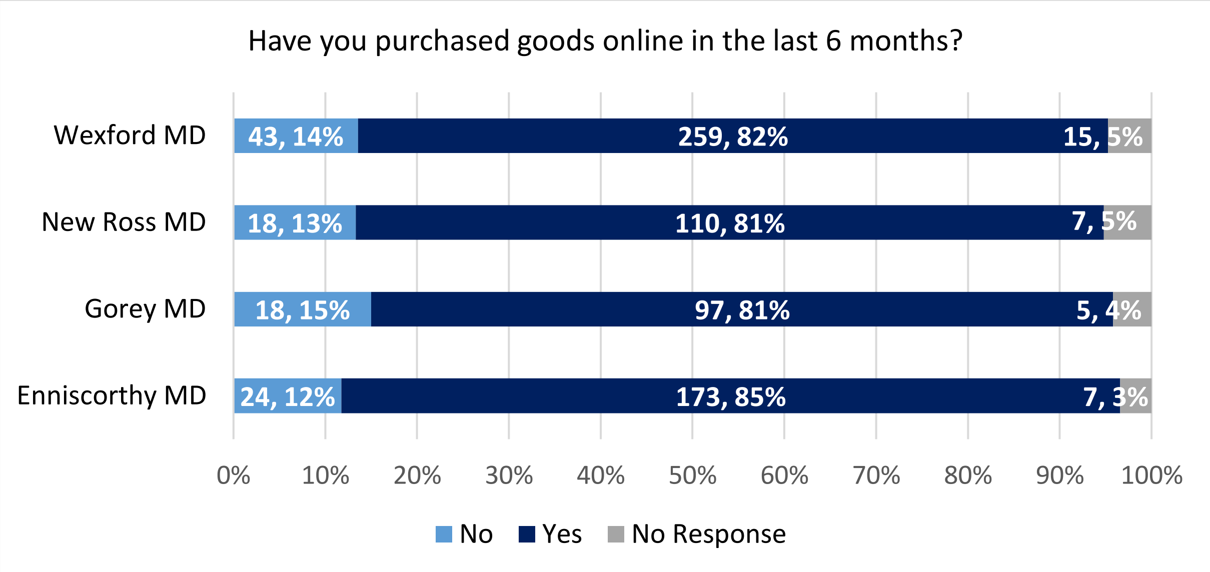


Figure 3.24 Online Shopping Last 6 Months

Figure 3.25 highlights the frequency of online shopping activity. 23% of respondents purchase items online once a month, with 20% of respondents purchasing at random. Unsurprisingly given the nature of the online survey a low number of respondents (4%) never use online services to purchase goods.

Figure 3.25 Online Shopping Frequency

The type of product generally purchased online is illustrated in Figure 3.26 below. As can be seen, a low proportion of respondents (10%) use online services to purchase groceries. Clothing and footwear items were the products purchased more commonly at 70%, followed by small electronics or books at 68%.

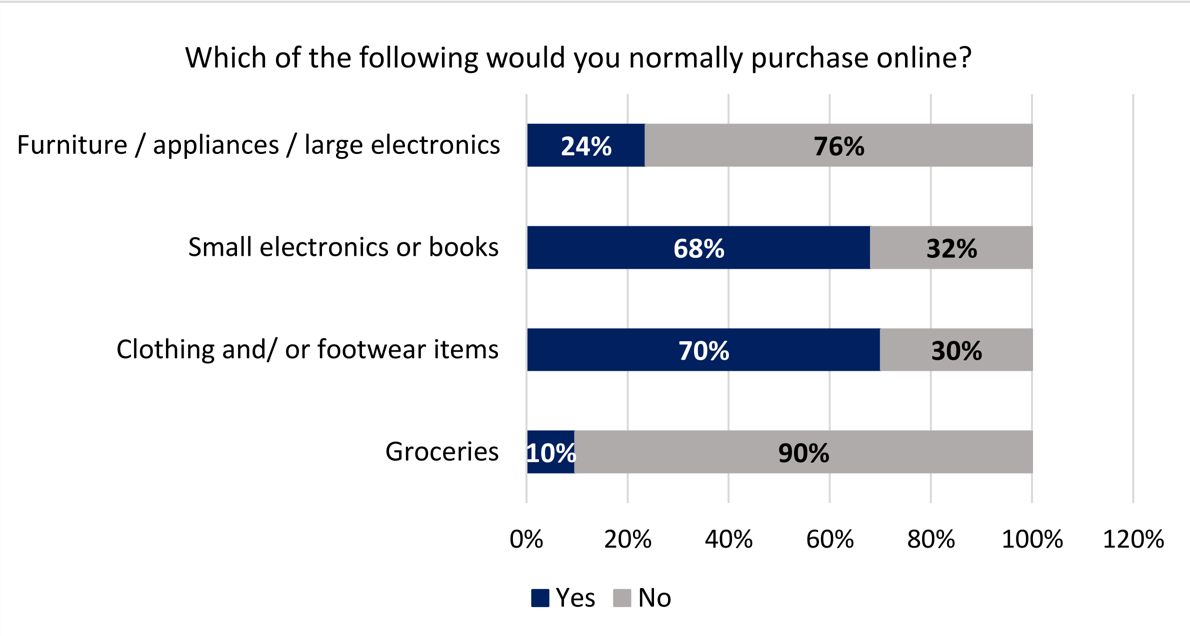


Figure 3.26 Online Shopping Typical Purchase Types

The average online spend in County Wexford is €103. The average County online shopping spend was highest in Enniscorthy MD, being 6% above the average County spend. This was followed by Wexford and Rosslare MD at 4% above average. The average spend for online shopping was lowest in New Ross being 22% below the County average.

Table 3.94 Online Shopping Average Spend

Average Expenditure		
Wexford County	€ 103.22	vs County
Enniscorthy MD	€ 110.34	6%
Gorey MD	€ 100.72	-2%
New Ross MD	€ 84.70	-22%
Wexford and Rosslare MD	€ 107.56	4%

Availability of products (41%) and Convenience (34%) were cited as the primary reasons why respondents used online shopping services. The next most popular answer was affordability at 16%.

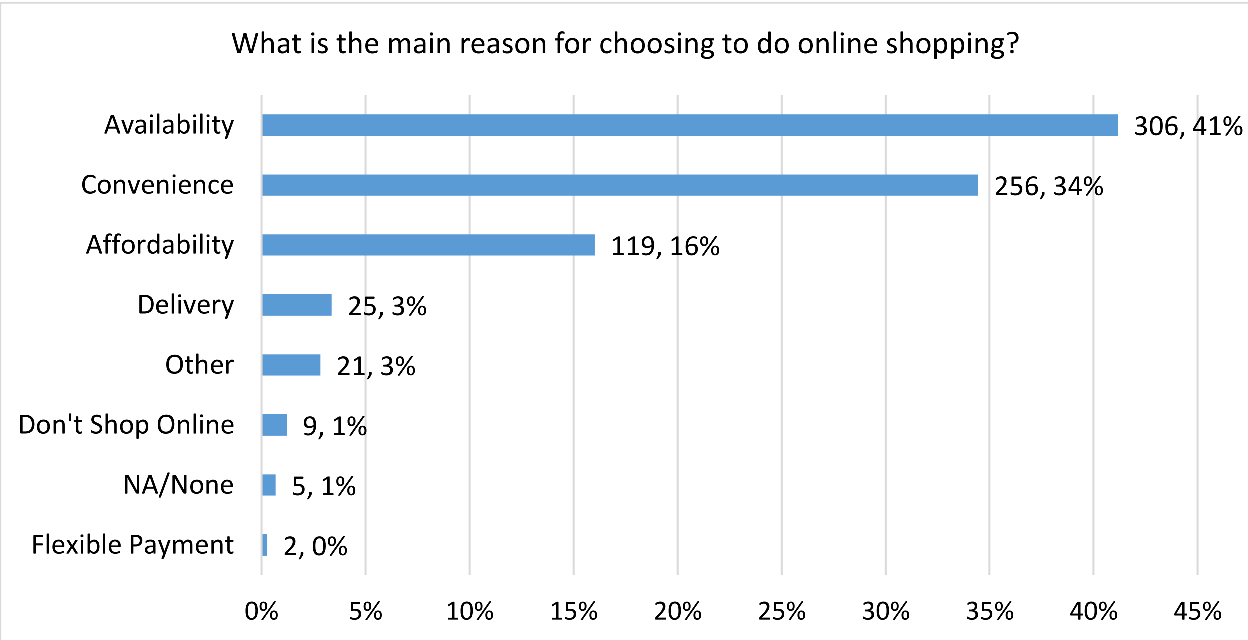


Figure 3.27 Online Shopping Main Reasons

A high proportion (82%) of respondents to the online survey stated that they would consider purchasing products online from local suppliers.

Figure 3.28 Online Shopping: Local Suppliers

3.4.7 Online Survey Results Summary

A summary overview of the Online Survey results organised by type of retail is provided below:

- Wexford Town was the most referenced centre for the main grocery shop at 47% with 40% of respondents as residents of the district, indicating its significant retail status within the county. Outside of the four main towns of Wexford, Gorey, Enniscorthy and New Ross just 7% of main grocery shopping took place. Distribution of expenditure is relatively normalised.
- In contrast to main grocery shopping, top-up shopping is more dispersed as is to be expected, with 32% of all top-up shopping taking place outside of the four main towns. Naturally, this is in line with respondent sentiments that the main attractions of this type of shopping in such locations are ‘accessibility’ and ‘convenience’. Distribution of expenditure is relatively normalised with the exception of New Ross with 11% higher than the sample average.

- Wexford Town was indicated as the most popular destination for clothing and footwear shopping cited by 64% of all respondents surveyed. Gorey (9%) was the second most popular destination, followed by Waterford and Dublin at 7% each. This shopping category provides the first indication of significant outflow for comparison goods. Notably the dominant reasons for shopping for this type in a given location are 'choice' and 'variety'. There are notably lower levels of satisfaction for shopping for such goods across the county in comparison to grocery and top-up shopping. Notably, the highest average expenditure is for those who shop externally at 14% higher than the sample average.
- The Wexford and Rosslare MD was the most referenced location for furniture and bulky good shopping at 47%, followed by Dublin at 13%, which indicates that there is relatively high proportion of leakage. 25% of online respondents conduct their furniture or bulky goods shopping outside of the County (5% in the Householder Survey), spending 14% (€207.26) more than the average spend on such items within the county.
- Over 80% of respondents in all four MDs had conducted shopping online within the six months preceding the survey. Nearly 1 in 4 of respondents shop online once a month. In contrast just 4% have never shopped online. The dominant categories of online shopping are heavily weighted toward small electronics, books and clothing and footwear and less so furniture and bulky goods. This is consistent with the trend of higher leakage in comparison and bulky goods shopping identified in the other surveys. Average spend was generally consistent with the exception of New Ross residents who spend 22% less than the county average.

Leakage

The most significant level of retail leakage from the Online Survey respondents is for clothing and footwear shopping, where 21% of the respondents conduct this outside of the county or online, spending on average 31% (€120.00) more than the average spend on such items within the county.

While consistent with the outcomes of the Householder Surveys the level of leakage identified in the Online Surveys is 7% higher for clothing and footwear shopping, however the average spend when conducting such shopping outside of the county is approximately €100 less (than the out of county spend identified in the Householder Surveys).

One quarter of online respondents conduct their furniture or bulky goods shopping outside of the county or online, spending 14% more than the average spend on such items within the county. Unsurprisingly a high majority of Online Survey respondents (80%) conducted shopping online in the six months preceding the survey, with 43% making online purchases at least once a month.

Clothing and footwear items were the most frequently purchased products for the online shoppers.

3.5 Leakage to Competing Centres

Tables 3.95-3.98 below illustrate shopper leakage outside of both the County and each of the MD's. Statistics represent the combined household and online surveys. As can be seen, out of county leakage was not significant with regard to either the Main Grocery or Top-up shopping at 1.3% and 3.0% respectively. Enniscorthy and New Ross did however suffer a higher proportion of leakage from within their respective MD's, with Wexford and Rosslare MD benefitting from these in-county leakages.

Out of County leakage was more prominent having regard to Clothing and footwear (16.6%) as depicted below. This is not unexpected given the relative proximity of centres like Dublin which offer a wider variety of product to the consumer of these shopping types particularly for residents to the north of County Wexford, with respondents from Gorey MD and Enniscorthy MD most likely to travel to the Capital for such items.

For respondents from New Ross MD, Waterford City was a much more prominent out of County draw for these types of shoppers. Wexford and Rosslare MD witnessed the most limited amount of leakage to competing centres which reinforces the position of Wexford Town as the retail hub of the County with a good choice of clothing and footwear stores.

Leakage was also prominent having regard to furniture and bulky goods shopping with 14.9% of respondents travelling out of County for such an exercise. Trips to Dublin for such shopping were most prominent for respondents from Gorey MD, Enniscorthy MD and Wexford and Rosslare MD, while New Ross MD respondents again travelled to Waterford City most commonly when going out of County. Online shopping is a further contributing leakage factor when it comes to clothing and footwear (2%) and furniture and bulky goods (3.2%). Tables 3.95 to 3.98 overleaf set these figures out in greater detail.

Table 3.95 Analysis of Main Grocery Leakage

	Leakage	Out of MD Flow	Out of County	Total	Total%
Grocery	Enniscorthy MD	64	10	74	5.9%
	Gorey MD	23	2	25	2.0%
	New Ross MD	68	4	72	5.7%
	Wexford and Rosslare MD	10	1	11	0.9%
	Total Leakage	165	17		
	Total %	13.1%	1.3%		

Table 3.96 Analysis of Top-Up Shopping Leakage

	Leakage	Out of MD Flow	Out of County	Total	Total%
Top-up	Enniscorthy MD	59	27	86	7.0%
	Gorey MD	16	7	23	1.9%
	New Ross MD	34	2	36	2.9%
	Wexford and Rosslare MD	27	1	28	2.3%
	Total Leakage	136	37		
	Total %	11.1%	3.0%		

Table 3.97 Analysis of Clothing and Footwear Leakage

	Leakage	Out of MD Flow	Out of County	Online	Total	Total%
C&F	Enniscorthy MD	192	52	6	250	19.8%
	Gorey MD	47	36	4	87	6.9%
	New Ross MD	127	80	3	210	16.6%
	Wexford and Rosslare MD	3	41	12	56	4.4%
	Total Leakage	369	209	25		
	Total %	29.2%	16.6%	2.0%		

Table 3.98 Analysis of Bulky Goods Leakage

	Leakage	Out of MD Flow	Out of County	Online	Total	Total%
Bulky	Enniscorthy MD	164	47	14	225	19%
	Gorey MD	27	35	6	68	5.7%
	New Ross MD	98	46	4	148	12%
	Wexford and Rosslare MD	12	49	14	75	6.3%
	Total Leakage	301	177	38		
	Total %	25.3%	14.9%	3.2%		

4.0 Town Centre Health Checks

4.1 Overview

This chapter provides detailed analysis of each of the four main settlements in County Wexford as identified by the retail hierarchy. These are Wexford Town, Enniscorthy Town, Gorey Town and New Ross Town. In addition, the settlements of Bunclody, Rosslare Harbour and Welllingtonbridge are also assessed given their district importance resulting from their geographical location and retail function. Utilising both qualitative and quantitative methods, the health checks provide a useful insight into each of the settlements' town centres with a specific focus on retail performance and potential. It is important to note that the health checks were carried out prior to the impact of COVID-19 Pandemic on the Irish economy. The health checks use the following indicators of viability and vitality as prescribed by the Retail Planning Guidelines (2012):

- Attractions;
- Accessibility;
- Environmental Quality and Amenity;
- Perception of Safety & occurrences of crime
- Diversity of uses;
- Multiple Representation;
- Levels of Vacancy; and
- Shopping Rents and Commercial Yields

The health checks for the four main towns conclude with a series of recommendations for actions to sustain and improve the performance of each town in sustaining a healthy retail sector. Land use surveys carried out as part of this strategy have been used to analyse indicators such as diversity of uses, multiples representation and levels of vacancy. It has also provided a mechanism to quantify the amount of the retail shopping types (comparison, convenience, bulky goods) within the town study areas, as well as the quantum of other commercial uses and vacancies.

Supplementary to the core elements of the Health Check Analysis referred to above are the outcomes of consultation sessions held with retailers and representative groups of each of the four main towns.

The results of pedestrian counts undertaken in mid-January and end-May 2018, along with on-street, online and telephone surveys also provide an important indicator of the vitality, vibrancy and customer experience of the retail centres. The findings that emerged from both the consultations and pedestrian counts have been used to inform the recommendations set out for each town and to confirm and/or redefine the core retail area, the identification of opportunity sites and the formulation of planning policies as set out in Section 6.0.

4.2 Wexford Town Health Check

Introduction

Wexford Town is the administrative capital of the County and a unique town with its own blend of commercial, retail, cultural and leisure activities, all of which are reflected in the town's urban structure and varied architecture.

Situated on the south side of Wexford Harbour on the estuary of the River Slaney the town has an appealing coastal setting. Consistent with many coastal towns the basic typology of streets in Wexford are largely derived from the sloping site, with contours running parallel to the shoreline and with shorter, less significant, streets running at right angles.

This typical layout does not produce a regular grid of streets as the town's history has introduced its own character into the street form, for example the inclusion of bends in streets for no known reasons.

During the nineteenth century Wexford gradually expanded over the shoreline resulting in the reclamation of land at the northern end of the town, including Redmond Square and the railway station.

In the twentieth century the quaysides were reclaimed, and thus providing the quayside and walkway areas which exist today, and which define the north eastern boundary of the town, where the main national railway line from Dublin to Rosslare Harbour hugs the walkway which runs along Wexford Quay.

Beginning at its north-western edge, the core retail area commences at the area around Redmond Square, which is fronted by Dunnes Stores, Sam McCauley Pharmacy and Health & Beauty Centre and Wexford's train station. From here pedestrian connections exist which link to the central hub of the retail core, North and South Main Streets. Theses streets provide a well-defined linear structure to the town centre through which several side streets and passageways offshoot and connect through to the Quay's frontage.

These side streets include; Monck and Charlotte street which harbour the towns evening and night-time economy; Church Lane which leads to a separate important hub of retail activity surrounding the Super Valu car park; Anne street which is home to the Town's post office; and Henrietta street which provides for a spectacular vista to the sea and the Commodore John Barry statue which inhabits the Crescent.

Along the quay itself, recent public realm improvements (particularly those around the Crescent) provide an attractive setting to the town where various pedestrian priority crossings allow for easy and safe access across Crescent Quay to the waterfront walkway which is commonly used for walking and as a site to accommodate temporary structures (speigeltent, marquee's etc.) used during the many festivals which occur in Wexford Town.

Moving back towards North Main Street and the point where it merges onto South Main Street, a compact street form with active frontages helps contribute to the vibrancy of the area where several well-known comparison brands are concentrated.

Attractions

As the most important retail and commercial centre within the County, Wexford Town has multiple attractors. The wide-ranging retail (convenience and comparison) and commercial offerings within the town centre ensure that it acts as the primary service centre for both locals and residents from surrounding towns and settlements. This reliable consumer base provides a strong foundation to the town's retail and commercial activities during business hours.

The evening and night-time economy is a further attraction to the town of Wexford, this having been recognised by being awarded Purple Flag[21] status in 2017 which is estimated to be worth in the region of €3.1 million[22] to the local economy in the three-year period following its accreditation. The focus of this nightlife is primarily concentrated towards both Monck Street and Charlotte Street, however the various other pubs and restaurants interspersed throughout the town also add to its credentials as an evening venue.

The award-winning quay offers a high-quality public open space for visitors and locals to enjoy and is a popular walking spot. There are plenty of rest points along the quays with several seating areas complemented by attractive landscaping, street furniture and lighting. Recent public realm improvements and the implementation of several pedestrian priority crossings from the town centre further serve to enhance the access and subsequently attract people to this important asset. These improvements have been achieved by way of the Crescent Quay Public Realm Improvement scheme which will play an important role in connecting the core retail area of the town to the Quay. This will assist in fully realising the potential of Crescent Quay which already profits from having notable buildings of architectural character including the old bank building (Asple & Co) and an old Ballast Office which frame the Quay which is centred by the statue of Commodore John Barry.

[21] The internationally accredited award for excellence in the nightlife of a town or city
[22] County Wexford Chamber of Commerce 2017

The National Opera House is located in Wexford town which serves as another attractor to the town centre and helps demonstrate the quality of the musical and artistic offering of the town. This is coupled with the Wexford Arts centre which hosts exhibitions, theatre, music and dance events and the recent addition of the Creative Hub at Bullring Mall which is home to artists, sculptors, musicians and craft makers.

The Bullring market serves as a further attractor for Wexford Town. The area itself has a long and storied history with roots in the 1798 rebellion where it was home to a pike-making factory. It is primarily known over the centuries however as being as a bustling marketplace. This remains the case to this day where a market takes place two days a week on Friday and Saturdays. Vendors operate from refurbished log cabins which are placed within the marketplace, complimenting the historic and ornate market buildings which remain largely unchanged since they were first built in 1877.

The town's rich cultural heritage and food and wine scenes which are celebrated throughout the year by means of a range of festivals and events which are concentrated along the Quayside. These include the Wexford Opera Festival and Fringe Festival, the Wexford Maritime Festival, Viking Fire Festival and the Wexford Food and Wine Festival, Speigeltent Festival, Wexford Winterland Festival and Art in the Open. Festivals provide a major boost to the local economy and further opportunity may exist so as to capitalise on such events through coordination across the many stakeholder groups involved in the organisation and scheduling of events.

Other attractions include a farmer's market which takes place every Friday in the Tesco car park and Wexford Public library. Wexford Park Gaelic Grounds and Wexford Racecourse also regularly attract large numbers of visitors supplementing patron numbers in the town on event days. The surviving medieval ruins of the town which include a substantial stretch of the town wall and Selskar Abbey and Westgate Tower are significant attractions. The renowned Twin Churches (Bride Street and Rowe Street), old graveyards and ruins also have the potential to attract visitors to Wexford, however there offering could be promoted and improved as discussed in the actions and recommendations section.

Wexford Town is also home to several other notable ecclesiastical buildings (including St Iberius Church on Main St and Franciscan Friary Church on Lower John Street) which serve as landmarks providing an important and pleasing contribution to the Wexford skyline at various vantage points throughout the town.

Accessibility and Pedestrian flows

The town is linked to Dublin by the M11/N11 National Primary Route and the national rail network which connects Dublin to Rosslare Europort via Wexford town. The town is also connected to Dublin and other urban centres including Waterford, which provides further connections to Cork and Limerick, by bus. Bus operators serving the town include Bus Éireann and Wexford Bus.

Wexford Bus also operate two local services around Wexford town and its hinterland providing one of the most extensive town services in Ireland (for a town of its size). Two buses operate throughout the day running from Clonard to Drinagh via Redmond Square, Whiterock or Maudlintown, with a bus departing from the terminuses in Clonard and Drinagh every half an hour.

In addition, Local Link Wexford work with eleven bus operators, all based in County Wexford to provide public transport services to more rural parts of the county. Through Local Link Wexford two Regular Rural Services (RRS) operate from Wexford to Rosslare and Carrig on Bannow respectively. Local Link Wexford also operates a Demand Responsive Transport (DRT) service for which routes vary according to passenger demand and bookings. These services have the ability to pick passengers up from their homes and generally operate one or two days each week.

There are also several taxi and hackney firms in operation in the town with an official taxi rank at Dunnes Stores on Redmond Square and one at the train station.

There is a plethora of car parks dotted at various locations throughout the town. At the northern end Redmond Road car park (adjacent to the Arc Cinema) to the north of the retail core. From there, car parks serve Dunnes Stores along Redmond Road, Redmond Square (to the rear of Sam McCauley Pharmacy) and the Super Valu car park between Church Lane and Common Quay Street. Further car parking exists at Ferrybank, Wexford Bridge (townside), close to quay side entrance of Shaw's Department Store, Supervalu/Key West car park, Rowe Street Church car park, High Street, Crescent Quay, Wexford Quay, Stonebridge car park at Paul Quay, the Talbot Hotel, to the rear of Colman Doyle Homestore close to South Main Street, Chamber Offices, Hill Street and Bride Street public and Church car park. The majority of these are surface/street level but multi-storey and underground parking is available at Paul's Quay (Stonebridge) and at Clayton Whites Hotel on Abbey Street respectively.

Despite the number of car parks serving the town, their locations were raised at the public consultation meeting as a significant issue with a general perception that the town would benefit from two or three large car parks (multi-storey or underground) to be situated at either end of the town. The proliferation of smaller car parking sites in prime locations around the town could then be considered for redevelopment for retail purposes (please refer to Section 6 on Opportunity Sites).

The compact street form, a single lane traffic management system and the pedestrianisation of substantial sections of South and North Main Street make Wexford Town a relatively easy place to navigate by foot, although there are awkward pinch points where pedestrianised zones and vehicular routes meet. There are numerous physical connections between the retail core and the Quay front via the side streets which offshoot from North and South Main Street with Skeffington Street, Charlotte Street, Monck Street, Common Quay Street, Church Lane, Anne Street and Henrietta Street providing access to the quays. However, as discussed later in the actions/recommendation section, suggested improvements could be made to the physical appearance of these streets to encourage more active street frontages that would entice higher levels of pedestrian movements between the quays and the primary retail core of Main Street.

Pedestrian traffic within town centres is an important indicator of the vitality and vibrancy of retail centres. Pedestrian counts provide a valuable record of passing movement, thereby helping to guide future planning and investment needs. Pedestrian counts are also a useful measure for validating the retail core of a town and for assisting in the identification of appropriate opportunity sites. To inform the health check and understand the key areas of shopper activity, four pedestrian counts were undertaken in Wexford town, the locations of which are identified in Figure 4.1 below:

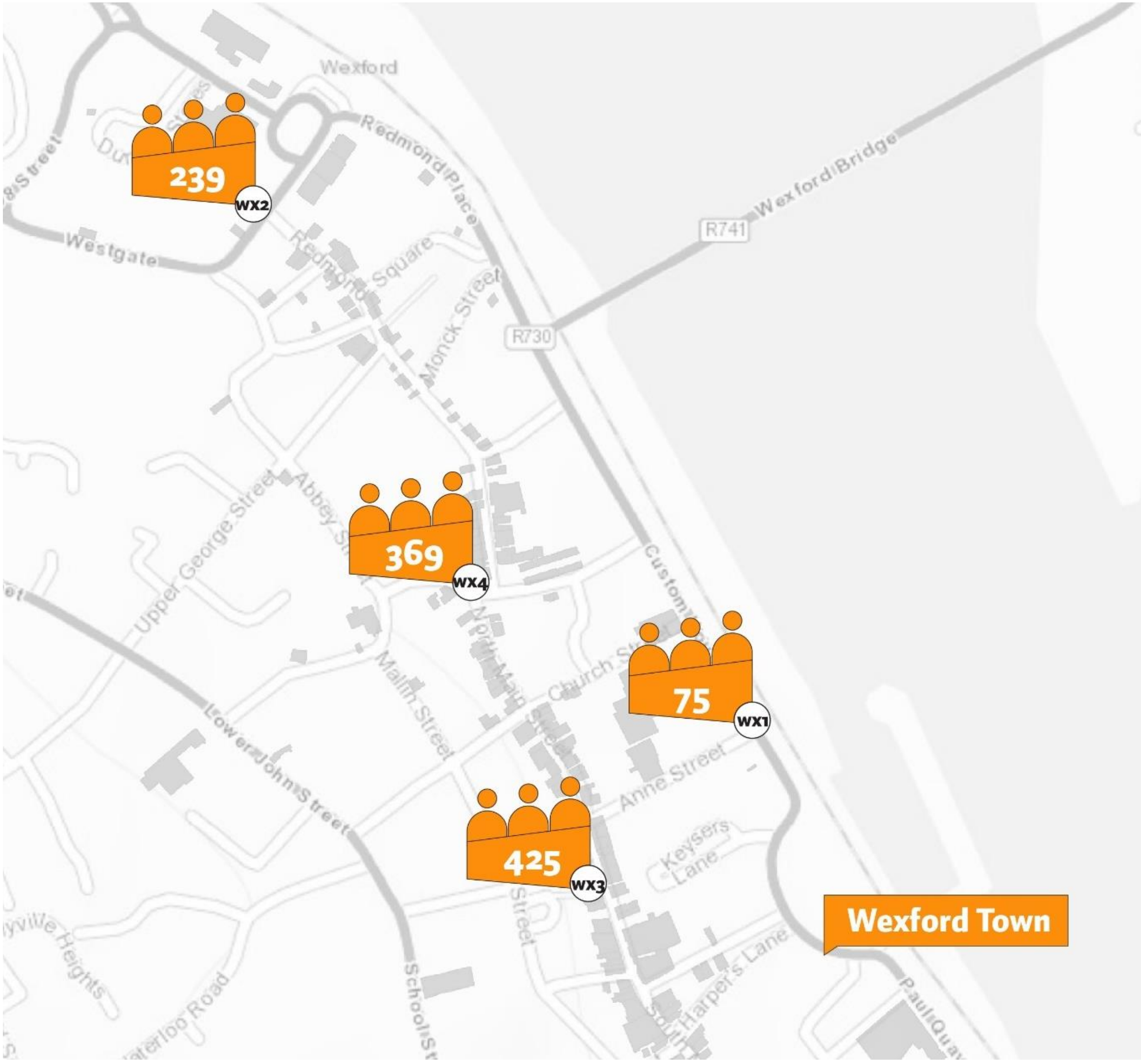


Figure 4.1: Pedestrian counts at locations WX1 to WX4 in Wexford Town

The results of the pedestrian counts undertaken in Wexford Town over the course of January 11th and 12th 2018 and 26th May 2018 at four 15-minute intervals in the morning, lunchtime and afternoon are set in Table 4.1. Full details can be seen in Appendix A.

Table 4.1 Wexford Pedestrian Count

Pedestrian Counts	WX1	WX2	WX3	WX4
Wexford Town	Custom House Quay close to junction with Anne Street	Redmond Square close to Dunnes Stores entrance	South Main Street close to Penny's Store	North Main Street outside the Bullring Market
Average Count	75	239	425	369
Peak Count	164	409	895	801

The highest pedestrian count was recorded on South Main Street close to the Penny's Store (WX3) at 4pm on Thursday afternoon (895 people). The highest average footfall (425 people) over the course of the surveys was also recorded at WX3. The second highest pedestrian count (369 people) was recorded at WX4 at North Main Street (WX4). It was noted that a popular craft and food market was operating at the Bullring close to WX4 on May 26th which would have inflated counts on the day.

The largest and second largest peak and average counts being at South Main Street and the Bullring could be as a result of the high-quality urban design for pedestrians as well as the presence of some of the town's largest retailers on this route. Footfall was also relatively strong at Redmond Square (WX2) with the presence of Dunnes Stores clearly the primary attractor to this side of the town. As might have been anticipated, the lowest footfall by far was recorded on Custom House Quay (WX1) close to the intersection with Anne Street.

Environmental Quality and Amenity

The town centre benefits from the presence of several focal point public realm areas notably Redmond Square, Selskar Square (Trimmers Lane West), the Bull Ring, the high quality landscape area and 1916 memorial on Abbey Street which fronts a section of the historic town wall, and the open space areas along the quays. These spaces offer important rest and amenity spaces for users of the town, and their maintenance and quality must continue to be safeguarded and enhanced where possible.

Along the award-winning quay itself, recent public realm improvements (particularly those around the Crescent) provide an attractive setting to the town where various pedestrian priority crossings allow for easy and safe access across Crescent Quay to the waterfront walkway. A little further out of the town centre the new flagship Min Ryan public park features surfaced walkways, parkland, playground, civic spaces, water features, and a Great War Memorial.

From a pedestrian perspective Wexford has an attractive and pleasant streetscape with the majority of shop fronts in the core retail area well presented with a mix of both contemporary and traditional style Shopfronts. The town centre has retained much of its original form along Main Street and is appealing to the pedestrian in both scale and use. As previously discussed, the prominence of ecclesiastical buildings throughout the town also serves to add to the architectural character of Wexford and provide some wonderful views and vistas which contributes to the attractiveness and environmental quality of the town.

Overall, on the day of the survey, Wexford Town appeared to be relatively litter free with a number of newly installed compaction bins in various locations as well as traditional bins provided throughout the town.

Perception of Safety

On the day in which the health check was conducted Wexford Town felt like a safe environment in which to navigate. The main streets (North and South Main street) and the various streets which offshoot these towards the Quay are all well surveyed during daytime business hours. However, as with all town centres, a few secondary streets (Skeffington Street, Harper Lane) which do not have a strong retail presence possess a reduced level of natural surveillance.

There are some well used pedestrian passageways (the one which connects North Main Street (beside Westgate design) to Anne Street and the one which connects south main street to Crescent Quay car park) which are well used during daytime hours but have little by way of active frontages to provide a sense of surveillance. Efforts should be made to encourage activation of these passageways as discussed in the actions and recommendations. At night-time such passageways should be well lit if pedestrians so wish to use them. The majority of night-time activity takes place on Monck and Charlotte Street, as well as along the bottom of South Main Street which benefits from numerous bars, restaurants and takeaways.

Diversity of Uses & Multiples Representation

The building survey of retail and commercial units for this strategy indicates that Wexford Town has a healthy diversity of retail and other commercial uses. Comparison retail dominates the retail use (by unit) types in the town occupying 21% of all units surveyed. 5% of units are occupied by convenience retail good stores with 3% selling bulky goods. 61% of units in the study area are occupied by non-retail commercial uses. There is a strong comparison goods offering in town, underpinned by both independent and multiple representation. In terms of the multiples the most well-known national and international brands include Dunnes Stores, Penny's and TK Maxx (fashion and homewares), Fat Face, Shaw's Department Store, Lifestyle Sports, JD Sports, Argos (homeware), DV8, Specsavers. Boots, and Holland and Barrett. Convenience goods retailers with a town centre presence include Dunnes Stores and Iceland at Redmond Square and Supervalu at Custom House Quay. Aldi and Tesco are situated on the southern edge of the town centre at Trinity Street and Distillery Road.

Bulky goods retailers are primarily located in retail and business parks in Clonard to the west of the town centre and Drinagh Retail Park to the south of the town. Large national retailers including Woodies, Halfords, Cost Plus Sofas, Hickey's, Ken Black, Homestore and More, DID Electrical are located alongside local bulky good retailers specialising in furniture, toys, homewares and home improvements/DIY.

Convenience goods retailer Aldi has two additional out of centre stores located at Clonard Retail Park and on Newtown Road. Super Valu also have an out of centre store on St. Aidan's road to the west of the town. There are also some small neighbourhood centres serving residential areas out of centre, including at Whitemill where a Lidl store is located alongside other supplementary neighbour centre uses like a butcher, pharmacy, takeaway restaurant etc.

A map showing the diversity of uses and the current location of convenience, comparison and bulky goods is set out in Section 6.2.1.

Table 4.2 Diversity of Uses – Retail Type Share (Wexford Town Retail Study Area)

Wexford Town	No. of Units	Unit (%)
Bulky	19	3%
Comparison	143	21%
Convenience	34	5%
Other Commercial	409	61%
Vacant	64	10%
Grand Total	669	100%

Levels of Vacancy

The retail study area of Wexford Town has a current commercial vacancy rate[23] of 10%. Generally, vacancies are spread out across almost all streets within the town centre with the exception of the stretch of South Main Street from Rowe Street/Church Lane to the junction with Henrietta Street, the central hub of the core retail area which has little or no vacancy. The most prominent vacancy within the retail core resides on North Main Street, in the retail unit to the rear of Clayton Whites Hotel (adjacent to the pedestrian entrance to Whites car park).

[23] Commercial Vacancy refers to either retail or other commercial uses

Shopping Rents and Commercial Yields

Retail units located on Wexford Town's prime retail streets of North and South Main Street are considered to garner in the region of €50 per square foot based on an analysis of the market in January 2020[24]. Typical North and South Main Street units would have a commercial yield in the region of 8%. Outside of the prime retail streets there is a sudden depreciation in achievable rental levels with units on secondary retail streets commanding between €8-10 per square foot and commercial yields of circa 12%. Other specific factors such as size, characteristics, and number of sharing tenants could result in slightly adjusted achievable values but the above provides an informed view of the local market as of January 2020[25].

Key Actions and recommendations

Overall, Wexford Town appears to be performing well and fulfilling its role as the primary retail centre of the County. With its pedestrianised streets, the town has a pleasant shopping environment and a relatively good choice of convenience and comparison retail outlets is on offer to consumers. However, improvements can be made to sustain the vitality and viability of the town centre, as set out below:

- Maintain the vitality and viability of Wexford town centre by consolidating the core retail area to ensure any future retail development is directed towards this area in the first instance
- Encourage and facilitate the reuse of vacant buildings or under-utilised sites throughout the town including the car parking opportunity sites (refer to Section 6)
- Consider improvements to the public realm to the front of the train station and consider improving pedestrian linkages around Redmond Square to create a more pedestrian friendly environment

[24] Data on shopping rents and yields obtained from Sherry FitzGerald – Haythornwaite for Wexford Town, Sherry FitzGerald - O'Leary Kinsella for Gorey, Sherry FitzGerald - O'Leary Kinsella for Enniscorthy and Sherry FitzGerald - Radford Auctioneers for New Ross.
[25] Ibid 114

- Redmond Square would also benefit from the introduction of further landscaping, planting and flowerbeds to provide a softer and more enticing edge to this important entry point to the core retail area of the town. Public benches should be included to increase the use of the Square
- Access to Selskar Abbey and Westgate Tower to be expanded through expanding the attractions opening times
- Promote access to Wexford Town's historic town walls through improved signage/street maps to make visitors aware of their presence and location
- Support a more integrated town centre from the Quays to North and South Main Street through the following:
  - Consider Pedestrianisation and provide public realm improvements (attractive paving and hard landscaping) at both Monck Street and Charlotte Street to complement and enhance these streets as evening and night-time destinations.
  - Improve pedestrianisation of the western section of Common Quay Street (beyond the Super Valu car park entrance) to improve the pedestrian experience and fulfil the potential of the Bull Ring Market area and Corn Market Area.
  - Consider the improvement of pedestrian priority on Church Lane to remove the awkward relationship between vehicles and pedestrians at the intersection with North Main Street. Provide public realm improvement to Church Lane to make it a more attractive pedestrian experience. This will also serve to enhance the setting of St. Iberius Church.
- Invest and improve the public realm (new attractive hard landscaping/paving) at the passageway which connect North Main Street (beside Westgate design) to Anne Street. This may encourage tenants to occupy the units along this passageway and provide some activation to this space which is well used but is lacking surveillance.
- Review and reduce wirescape within the town centre (if possible) which currently serves to detract from the attractiveness of the core retail area.
- Incentivise owners to make improvements to their buildings/shopfronts within the retail core through grant funding for a 'Shopfront Improvement Scheme'.

- Adopt a 'Shopfront Improvement Scheme'. The scheme should be guided by a Planning Guidance Note outlining; eligibility, grant funding, design principles criteria etc. to encourage use of the scheme and to encourage the re-use of upper floors.
- Adopt a pilot programme for the extension of opening hours to allow for late night shopping on South and North Main Street. For the pilot project, this could be scheduled to take place alongside one of the town's major festival/events.
- Encourage greater support for retailers and businesses within the town centre and 'Purple Flag' area.
- Consider promotion and development of the RIC Barracks on Barrack Street as a tourist attraction.
- Conduct an audit and improve pedestrian linkages to the emerging Trinity Wharf sustainable urban quarter. This will increase the connectivity of the town as a whole and aid in ensuring that the economic benefits of the Trinity Wharf project will be realised in the established centre of Wexford Town.
- Undertake an access audit of the built environment to seek to improve accessibility with the town for people with disabilities.
- Seek a reduction, better co-ordination and design of signage generally within the town to avoid clutter and improve way finding.
- Consider redevelopment of smaller car parking sites in prime town centre locations for appropriate retail and or commercial town centre uses.
- Consider increasing the extent of the pedestrian priority zone further along South Main Street (to the South) so to encourage access to underutilised segments of the town centre.
- Continue to support the established festivals and events that take place within the town and consider opportunities for further events. The introduction of a Wexford Town Team could consider the feasibility of additional festivals and events.

4.3 Enniscorthy Town

Introduction

Enniscorthy is the second largest town within County Wexford according to the 2016 census. It is located centrally within the County and is therefore well positioned in terms of access to the other main towns being; 24 kilometres north of Wexford town; 30 kilometres to the east of New Ross; and 28 kilometres to the south of Gorey. Dublin City is circa 120 kilometres to the north of the town. The town’s development has stemmed from an old Norman settlement situated on the banks of the River Slaney which bisects the town.

Enniscorthy’s medieval origins have developed as a result of the town’s natural topography (elevated and overlooking the River Slaney) and today these medieval origins serve to provide the primary attractions on offer. The built environment is made up of many buildings and structures of heritage interest dating from the late 18th and 19th centuries. All of the buildings in the area and elements of their built fabric contribute to creating the present streetscape and distinctive character of Enniscorthy.

The layout of the town is centred around Market Square, which is framed by Main Street, Weafer Street and the Enniscorthy Municipal District Council building which adds to the square’s sense of importance. From here Market square leads to Castle Hill where Enniscorthy Castle is located, occupying a strategic and elevated position which overlooks the River Slaney.

Attractions

The largest attraction in the town is Enniscorthy Castle which includes a tourist information point. It stands proudly in the heart of the town at Castle Hill. The presence of the castle on the western side of the town adds hugely to the visual identity and distinctive historical character of the town and sets Enniscorthy apart as an important heritage town. The castle was refurbished in 2011 and is open to the public as a museum with exhibitions on the development of the castle and town from its 16th century origins. It also has unique displays showcasing the town as it would have appeared in the 1950s – celebrating Enniscorthy's role as the setting for the 2016 Oscar nominated film, Brooklyn.

Vinegar Hill (located on the eastern side of the River Slaney) with remains of a windmill structure and the scene of the 1798 Irish rebellion battle is located on the eastern side of the River Slaney and provides dramatic views over the town centre and beyond to the west.

Other notable attractions include St. Aidan's Cathedral, designed by famous architect Augustus Pugin, and the Anthenaeum Museum & Historic Theatre, a site which has encouraged a sense of strong nationalistic patronage through its links to the 1916 Easter uprising.

There are two hotels centrally located within the town: Treacy's Hotel east of the River Slaney and the Riverside Park Hotel and Leisure Club at the Promenade on the quay which benefits from being located along a riverside walk adjacent to the River Slaney.

In terms of local attractors, Enniscorthy caters for an established range of town centre services (convenience retail providers, post office, pharmacy etc.) which encourage locals to the town centre to accommodate their everyday needs. Enniscorthy farmers market also takes place weekly on a Saturday in Abbey Square and is well renowned for offering high quality local produce. In terms of festivals, the town plays host to the Enniscorthy Street Rhythms Dance Fest, the Strawberry Festival and Enniscorthy Rockin' Food Festival all take place through the summer months and again presents an opportunity for local producers to showcase their products.

Accessibility and Pedestrian Flows

Enniscorthy is strategically located in the centre of County Wexford providing it with good connections to the other main towns within Wexford and Dublin City. The N11 main National Primary Route which runs through the town and across the River Slaney links it to Wexford Town and Gorey, while the N30 National Primary Route connects to New Ross in the south west.

The M11 Enniscorthy bypass was opened in the Summer of 2019 and has significantly alleviated traffic through the town and has reduced travel times to and from Dublin.

In terms of public transport, the town benefits from its position on the Dublin to Rosslare Europort rail line, with a regular service (three trains a day) facilitating visitor, commuter and resident access to and from the town. The railway station is located to the east of the town centre, across the River Slaney. Bus Eireann and Wexford Bus offer regular services offering access to a range of intercounty destinations (Wexford Town, New Ross, Gorey and smaller settlements throughout the county) and destinations further afield including Kilkenny, Carlow, Waterford City, Cork and Dublin. Wexford Local Link provide two Regular Rural Service (RRS) routes connecting Bunclody to Enniscorthy and Tullow-Enniscorthy-New Ross. Local Link Wexford also operates a Demand Responsive Transport (DRT) service for which routes vary according to passenger demand and bookings. These services have the ability to pick passengers up from their homes and generally operate one or two days each week. There are also a number of taxi & hackney companies operating within the town.

Surface car parks are located at Abbey Square Shopping Centre and the promenade serving the area around the riverfront and the western periphery of the retail core. There is also a large car park at Pearse Street from which there is pedestrian access to Rafter Street. A small surface car park is also situated to the rear of The Bailey Bar and Restaurant adjacent to the Dunnes Stores on Barrack Street which is served by an underground car park. On street parking is provided along the main streets around Market Square and also along Irish Street. Duffry Gate car park in the Fairgreen area supports the Super Valu store located on Duffry Gate road at the northern part of the town.

A series of measures have been introduced in recent years to facilitate easy pedestrian movement within the town centre. The most notable of these are the pedestrianisation of Slaney Street and Rafter Street. Pedestrians wishing to access the town from the east however experience some difficulty particularly at the R744/N11 intersection.

Pedestrian crossings located in high footfall areas around the town such as from Rafter Street onto Market Square and from there to Irish Street (providing access to Dunnes Stores) also facilitate ease of movement around the town.

To inform the health check and understand the key areas of shopper activity, three pedestrian counts were undertaken in Enniscorthy, the locations of which are identified in Figure 4.2 below:

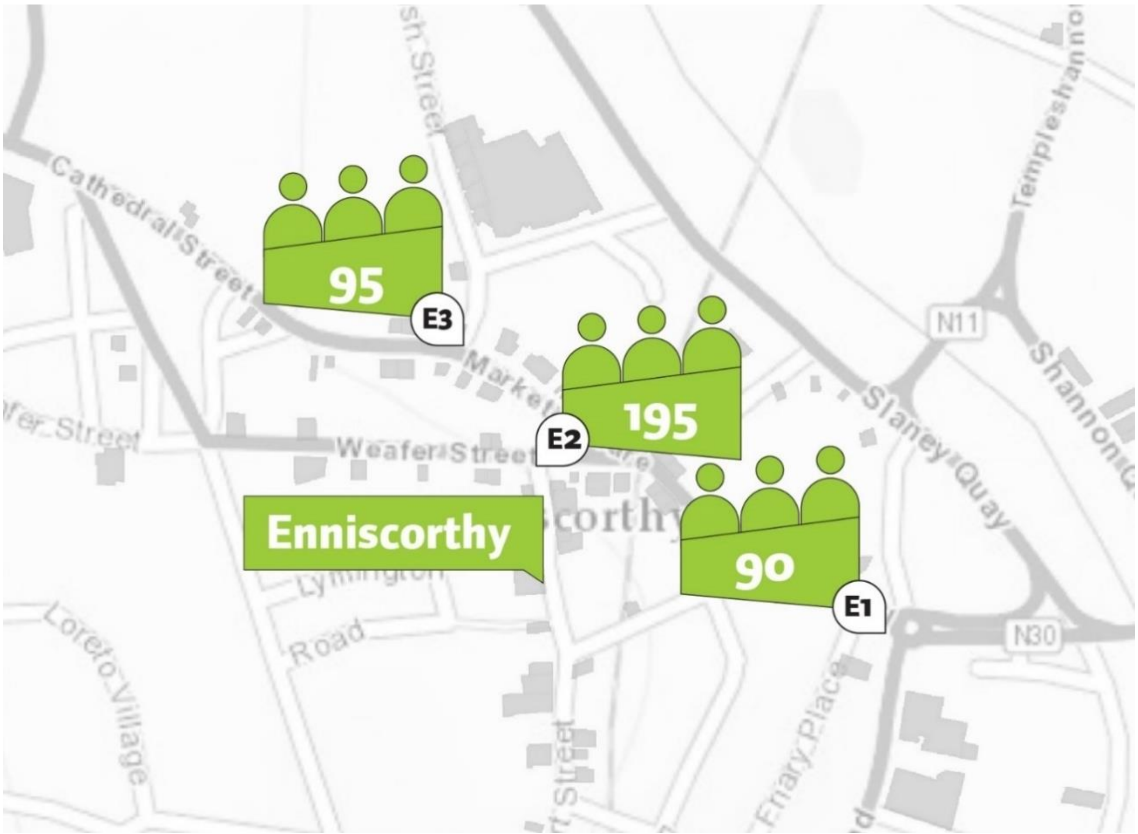


Figure 4.2: Enniscorthy pedestrian count locations

The results of the pedestrian counts undertaken in Enniscorthy Town over the course of January 11th and 12th 2018 and 26th May 2018 in the morning, lunchtime and afternoon for 15-minute intervals are set in Table 4.3 below. Full details can be seen in Appendix A.

Table 4.3 Enniscorthy Pedestrian Counts

Pedestrian Count Location Ref:	E1	E2	E3
Location Description:	Junction of Castle Hill and Friary Place	Market Square end of Rafter Street	Irish Street close to junction with Main Street
Average Count	90	195	95
Peak Count	162	309	155

The results of the pedestrian count undertaken indicate that the Market Square end of Rafter Street (E2) is by far the busiest point surveyed in the town recording the highest footfall on all three survey days with an average count of 195 and a peak count of 309 people on Friday afternoon at 2pm. This is a positive endorsement of the Rafter Street and Market Square area as the retail core of the town. Irish Street (E3) was recorded as having the second highest footfall on average (95 people) of the three locations surveyed, indicating that there is a reasonable footfall between Dunnes Stores, the town's main retail anchor, and Market Square/Rafter Street. The junction of Castle Hill and Friary Place had similar average footfall to that of E3 at 90 people on average per 15-minute interval.

Environmental Quality and Amenity

The town centre and retail core area of Enniscorthy has an elevated location overlooking the River Slaney which separates the western side of the town from the east (the east which is primarily in residential use with some retail and commercial activity at junction with Templeshannon and Quay). The historical street layout is typical of a medieval market town with traditional streetscapes radiating out from Market Square.

The town centres scenic setting on a hillside overlooking the River Slaney is further enhanced by its rich heritage evidenced by the medieval street structure and by the presence of Enniscorthy Castle in the town centre. Furthermore, the architectural features of the 'Enniscorthy shopfront' displayed along castle street are recognised for their distinctive architectural features characterised by a series of elliptical-headed or round-headed openings that should continue to be preserved, protected and promoted.

These natural and inherited assets are central to the towns appeal providing a rich foundation on which public realm improvement measures and landscaping proposals can be integrated. The tree lined riverside along Shannon Quay and Abbey Quay offer a pleasant space to stop, rest and enjoy views. The redbrick building currently occupied by AIB at Abbey Quay bridge opens onto a pleasant public space (Abbey Square) which extends toward the riverside walkway with planted trees and visitor information signs along the way.

The attractively paved Slaney Street occupies a strategic position within the town centre linking Island Road and the riverfront to Market Square. Paving on Church Street and Rafter Street have also added to the quality of the public realm, ornate archways bookend this pedestrianised street which leads onto Market Square to the west. Market square occupies a central position within the western side of the town centre where tiered seating (that features as a designed-in element of the square), streetlights, pedestrian street signage, planted trees and a monument commemorating the 1798 Rebellion. Further opportunities however exist to improve the attractiveness of the square as a whole as discussed in the actions/recommendation.

A Multi-Use Games Area (MUGA) and park at Duffry Hill and Cathedral Street (opposite Super Valu), Orchard Peace Park and the triangle parcel of land between Fairview Terrace and Cathedral Street add to the green amenity space provided in the town centre. The recent refurbishment of Enniscorthy Playground situated on the banks of the River Slaney is also a welcome addition to the town attracting families into the town centre which in turn will support the viability of the retail sector in the town. Funding has also been secured to provide a multi-use games amenity (MUGA) at the park located at the Ross Road/Andy Doyle Close intersection although works have yet to commence.

At the time of the health check high vacancy levels were observed throughout the town with many vacant units showing signs of wear and tear that threatens the aesthetical appearance of the town. Litter bins are provided throughout the town and there was no apparent problem with littering on the day of the survey. In 2016, Enniscorthy received the accolade of the second cleanest town in Ireland in the Irish Business Against Litter survey.

Community and recreational infrastructure in the town include Waterfront Swimming Pool and Leisure Centre, Enniscorthy Golf Club, St. Patrick's Pitch and Putt Club, a Greyhound Stadium and racing track, GAA, soccer and rugby clubs and Enniscorthy Sports Hub (regional sport and athletics track).

Perception of Safety

On the day in which the health check was conducted Enniscorthy had the feeling of a safe and secure town in which to conduct daily business-like shopping etc. The main streets which surround Market Square (Main Street, Weafer Street, Rafter Street, Irish Street and Slaney) are all well surveyed during daytime business hours. Improving the levels of occupancy within the town centre (Slaney Street etc.) as discussed in the actions and recommendations section will further add to the perception of safety and surveillance in Enniscorthy. Activation of the vacant sites along Irish Street which lead to Dunnes Stores would also add to the sense of security on one of the key town centre streets.

Diversity of Uses and Multiple Representation

Comparison goods lead the retail offering within the Enniscorthy Retail study area at 19% of the occupied units. In the majority of cases these are locally owned, independent retailers, however, Enniscorthy would benefit from the presence of a national anchor retail store within the town centre strengthening the town's appeal as a retail destination helping to increase trade for independent retailers and contributing to the viability of the retail sector in the town. Dunnes Stores, along with McCauley Health and Beauty, O'Brien's and Vodafone are some of the few national multiples who have a presence in Enniscorthy town centre.

The majority of occupied units are small independent retailers with some specialist gift stores, stationery, gift shops, and several high-end women's boutiques).

The comparison sector is followed by Convenience retail at 8% and Bulky goods at 4%. As the town does not have a significant bulky goods offering (either within the town or out of town centre) this can be considered a positive for future development of the retail core, particularly given the presence and location of Abbey Square Shopping Centre and the adjoining blocks which have potential as a centre for furniture and bulky goods or other large floorspace uses.

While there are other complementary commercial uses (53%) such as bars and restaurants situated in the town centre, the development of more diversity in this regard would generate increased footfall with positive knock on effects for retailers.

A map showing the diversity of uses and the current location of convenience, comparison and bulky goods is set out in Section 6.2.2.

Table 4.4 Diversity of Uses – Retail Type Share (Enniscorthy Retail Study Area)

Enniscorthy	No. of Units	Unit (%)
Bulky	11	4%
Comparison	55	21%
Convenience	22	8%
Other Commercial	142	53%
Vacant	37	14%
Grand Total	267	

Levels of Vacancy

High levels of commercial vacancy are apparent throughout the town centre (particularly on Slaney Street) with all streets containing some unoccupied units. The vacancy rate within the Enniscorthy study area is 14%. In consolidating the retail offering, appropriate planning policies should be adopted with a focus on increasing the potential for occupancy of vacant units on Rafter Street, Market Square, Main Street, Slaney Street, Weafer Street and Irish Street which form the central retail hub of the town.

Shopping Rents and Commercial Yields

Prime retail rent on Enniscorthy's Rafter Street is considered to be in the region of between €15-€16 per square foot based on an analysis of the market in January 2020[26]. Rents do however vary considerably from street to street even within the centre of the town, with rents on Slaney Street in the region of between €10-€12 per square foot despite its location just off Market Square. Typical commercial yields in and around the town centre would range between 10%–12%. As above with Slaney Street, retail provision located on secondary streets and other specific factors such as size, characteristics, and number of sharing tenants could result in slightly adjusted achievable values but the above provides an informed view of the local market as of January 2020.

Key Actions and recommendations

Enniscorthy has a very attractive natural setting, architectural heritage and a rich historical background, the physical remnants of which form part of the town's most notable assets. However, as a modern retail centre there are areas that Enniscorthy can improve on to enhance the vitality and viability of the town centre and increase its competitiveness with other retail destinations.

- Incentivise owners to make improvements to their buildings/shopfronts within the retail core through grant funding for a 'Shopfront Improvement Scheme'.
- Consider adopting a 'Shopfront Improvement Scheme' Planning Guidance Note outlining; eligibility, grant funding, design principles criteria etc. to encourage use of the scheme
- Improve the quality of the public realm at Market Square; add soft landscaping to the Square add two more public benches to the square to encourage rest and relaxation

[26] Data on shopping rents and yields obtained from Sherry FitzGerald – Haythornwaite for Wexford Town, Sherry FitzGerald - O'Leary Kinsella for Gorey, Sherry FitzGerald - O'Leary Kinsella for Enniscorthy and Sherry FitzGerald - Radford Auctioneers for New Ross.

- Add public benches and street furniture along Rafter Street to compliment the successful and well-functioning pedestrianised street
- Invest and improve the public realm (new attractive hard and soft landscaping/paving) along Slaney Street to increase the appeal of utilising this approach to the town centre which can aid in supporting the established retailers located on this street
- Review and reduce wirescape within the town centre (if possible) which currently serves to detract from the attractiveness of the core retail area
- Encourage access from the town centre to the River Slaney by providing pedestrian priority crossings across Island Road at the intersections with; Barrack Street; Slaney Street; Slaney Place; and Abbey Square
- Support the objectives of Wexford County Council's 'Enniscorthy Tourism Project' to utilise the town's substantial architectural heritage and natural assets of Enniscorthy Town to deliver a compelling visitor experience and solidify Enniscorthy's potential as a long-term sustainable tourist destination
- Support the key objectives of the Templeshannon Regeneration Strategy, particularly the implementation of the Enniscorthy Flood Defence Scheme and the provision of a new pedestrian bridge across the River Slaney connecting the Town Centre with the railway station.

4.4 Gorey Town

Introduction

Gorey is the main town serving the north of the County and a historic market town. It's strategic location approximately 52km north of Wexford town and 100km south from Dublin city centre has resulted in residential dwellings surrounding the town, making it particularly popular for commuters to Dublin. As such Gorey has experienced significant growth in recent years. However, it does not have the feel of a dormitory commuter town as the town centre displays an immense sense of vibrancy and lively atmosphere. This can partly be attributed to its compact size and planned town grid which provides for a pleasant, congenial experience when traversing the town. It can also be attributed to the high levels of retail and commercial occupancy within the town which have served to reduce the number of vacant or derelict buildings which can often serve to detract from the quality of the built fabric of towns.

It is surrounded by undulating hills which rise around the town providing for an attractive setting. Its locational benefits are further enhanced by its proximity to the seaside with popular beaches nearby. These natural landscape features and locational benefits all add to the vitality currently experienced within the town.

Gorey also benefits from a well-established and maintained arts and culture scene underpinned by the Gorey School of Art, Bracken Arts Club and the Gorey Art Collective, a non-profit local community art group.

Attractions

As noted above, Gorey's proximity to Dublin City has contributed to its development as a residential hub to the south of Dublin, making it an attractive place to live and commute from. It further has a well-defined retail core centred around Main Street, extending out in recent years to include Esmonde Street and a series of side streets to the northwest and southeast of Main Street, namely Rafter Street, John Street, Church Street, Thomas Street and of course Gorey Shopping Centre.

It is a compact and vibrant town centre with a wide choice of fashion boutiques, gift shops, jewellers, specialist arts and craft shops, hair and beauty, restaurants, cafes and public houses. The traditional shopfronts of long-established businesses in the town are complemented by a range of well-maintained and inviting modern retail stores with a strong presence of comparison goods (particularly clothing) units.

The high quality of the retail and commercial offerings within the town, its attractive streetscape and setting and the ease with which it can be navigated as a result of how compact it is, all contribute to making Gorey an attractive destination for shopping.

There are two hotels located at the edge of town Ashdown Park Hotel and Leisure Club and the Amber Springs Hotel and Health Spa. Several other hotels including the Seafield Hotel and Spa Resort and Marlfield House Hotel are situated within a short drive from the town.

Other attractions include Gorey Little Theatre, Gorey School of Art and The Artbox Gallery situated in the town centre. Adventure Alley and Fun Zone play centre and Omniplex Cinema are located in Gorey Business Park on The Courtown Road. A weekly farmers' market also takes place on Saturdays located in the car park of Gorey Community School.

Gorey Market House festival takes place on a yearly basis in early August and is supplemented by the GAP arts festival later in the month which serves to acknowledge Gorey's long-standing artistic history. The Market House building is also subject to a proposal to utilise it as a multi-purpose mini-arena to accommodate concerts, trade shows, corporate products and community events

Accessibility and Pedestrian Flows

From the north, Gorey is easily accessed via the M11 Motorway which serves to connect the town to Enniscorthy, Wexford Town and Rosslare Europort to the south and Dublin to the north. Surrounding settlements such as Ballycanew, Ballyedmond and Monamolin are linked to the town by the R741 regional route with Courtown and Riverchapel connected by the R742. Notwithstanding the Gorey bypass, high levels of vehicular traffic passing through Main Street in both directions was noted on the day of the survey with congestion beginning to build from around 4pm onwards. With high footfall, as was evidenced on the day of the survey, the presence of several pedestrian crossings and traffic light systems is important to maintaining a safe pedestrian environment.

In terms of public transport, Bus Éireann and Wexford Bus operate frequent services to surrounding towns and villages and to key destinations such as Rosslare Harbour and Dublin. Gorey Train Station with daily connections to Dublin and Rosslare is conveniently located at Knockmullen within walking distance to the town centre and The Avenue.

Through Local Link Wexford a Regular Rural Services (RRS) operates from Riverchapel to Gorey. Local Link Wexford also operates a Demand Responsive Transport (DRT) service for which routes vary according to passenger demand and bookings. These services have the ability to pick passengers up from their homes and generally operate one or two days each week. Taxi and hackney firms also operate within the town with a taxi rank located on Market Street.

Car parking provision within the town centre comprises a mix of on street parking and surface car parks located at Market Street, two car parks on Pearse Street (the larger of which adjoins Pettit's Supervalu rear car park), the car park at the Civic offices, in the church yard on The Avenue, at Esmonde Street. On the day of the survey, all car parks appeared to be close to capacity with delays evident at Market Street which resulted in some congestion in this area.

Surface and underground car parking is provided in Gorey Shopping Centre. Large surface car parking is also provided at the Tesco superstore to the south west of the town, the Mill retail park to the east of the town and the Aldi and Lidl stores to the north east of the town and Gorey Railway station to the south of town.

To inform the health check and understand the key areas of shopper activity, three pedestrian counts were undertaken in Gorey, the locations of which are identified in Figure 4.3 overleaf.

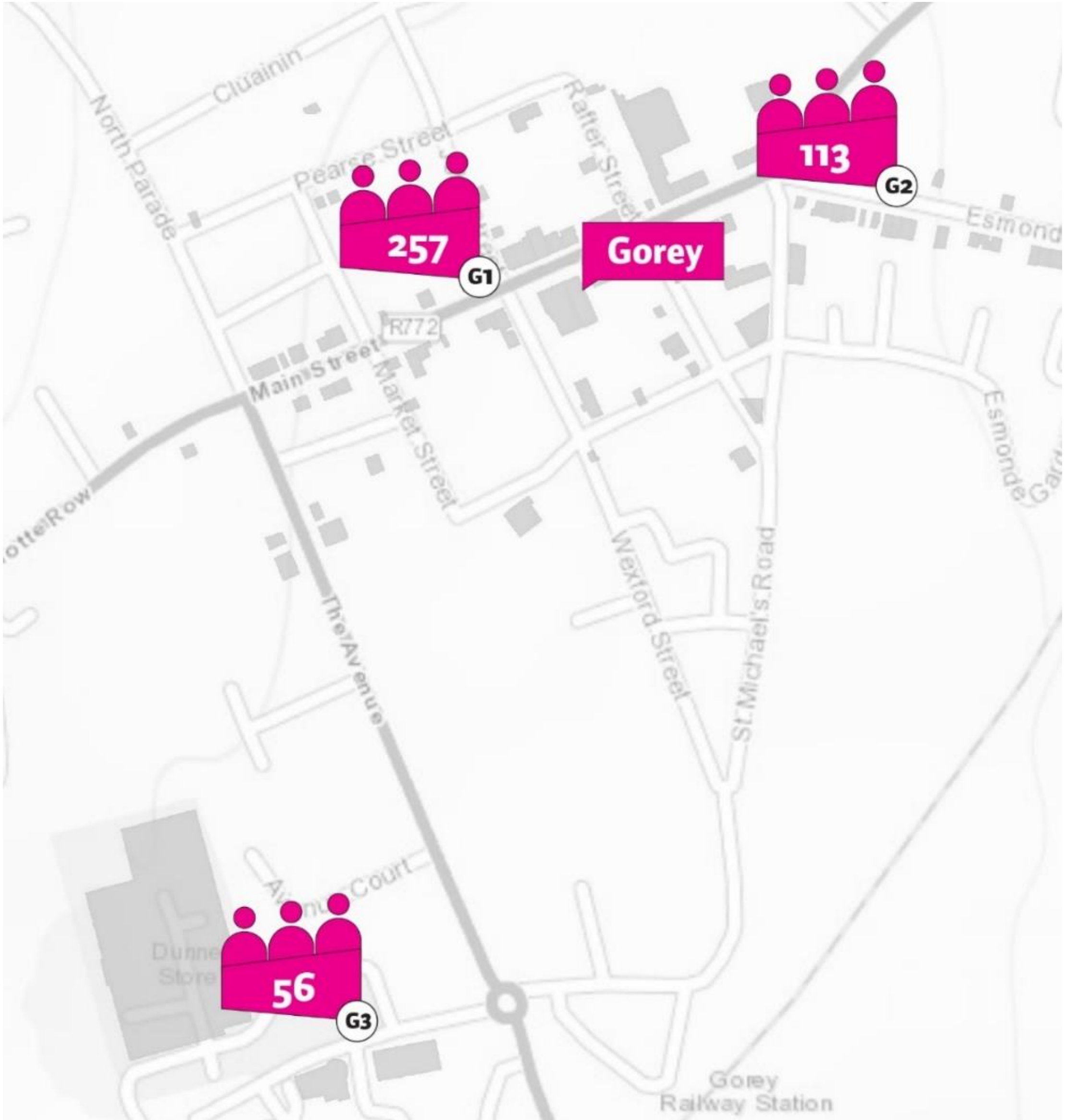


Figure 4.3: Gorey Pedestrian Count Locations

The results of the pedestrian counts undertaken in Gorey Town over the course of January 11th and 12th 2018 and 26th May 2018 in the morning, lunchtime and afternoon for 15-minute intervals are set in Table 4.5 overleaf. Full details can be seen in Appendix A.

Table 4.5 Gorey Pedestrian Counts

Pedestrian Count Location Ref	G1	G2	G3
Location Description	Main Street close to Pamela Scott retail store	Esmonde Street close to the Gaslamp Gallery	Outside the entrance to Gorey Shopping Centre on Paul Funge Boulevard
Average Count	257	113	56
Peak Count	405	145	184

Comparatively high levels of footfall were recorded on Gorey's busy Main Street (G1) during all surveys undertaken with the busiest period recorded on Thursday afternoon (11th January) at 2pm (405 people) when it was noted that a busker was playing music. The average count at this location (257 people) far exceeded the next busiest location point surveyed, Esmonde Street (G2).

Here peak footfall occurred on Saturday lunchtime and afternoon (145 people) when it was noted that nearby construction works were occurring. The third survey location outside the main entrance to Gorey Shopping Centre (G3) was selected to provide an overview of potential footfall levels between the town centre and the Shopping Centre and surrounding residential areas. Heavy vehicular traffic was observed during the counts undertaken at this point with pedestrian footfall relatively low – a peak figure of 184 people was recorded on Thursday afternoon 11th January.

Environmental Quality and Amenity

The streetscape and public realm are colourful and inviting with low levels of vacancy and an abundance of well-maintained landscaping features including a tree lined Main Street, plants and flower beds and rest areas with benches.

The prominent Market House building on Main Street is also due to be restored, coinciding with its planned use as a multi-purpose mini arena and community facility discussed earlier. Funding for this restoration was secured through the Rural Regeneration and Development fund and will further add to the environmental quality of the Gorey streetscape.

Gorey Town Park is a short distance to the north-west of Main Street. The park provides a large amenity and recreational area to residents and visitors. Facilities at the park include a playground, outdoor gym, walking track, skate park and two football fields. The park has recently received circa €2million in funding for its complete redevelopment with the aspiration to create the best town park in the south east of Ireland. Furthermore, projects like the Gorey 'Magic Compass Garden' have increased the biodiversity within the town and serve to add to the environmental quality and amenity offering of the town.

Image Credit: Jonathan Billinger)

The 'Avenue Renewal Project' centred around Gorey Civic Square and The Avenue was completed in 2017 providing high quality public realm, street art and hard and soft landscaping features. This investment has helped instil a tangible sense of place in this part of Gorey making it a pleasant and attractive area to visit and traverse. This is particularly important given the functionality and usage of the Civic area. While the footpaths along Main Street are generally of adequate quality some signs of wear and tear were apparent on the day of the survey. Overall, the town centre is very well maintained with litter bins provided throughout the town and no apparent problem with littering on the day of the survey.

Perception of Safety

On the day in which the health check was conducted Gorey was incredibly vibrant and therefore the perception of safety and surveillance was high. Main Street and Esmond Street are all well observed during daytime business hours while the complimentary cafe/restaurant, theatre and artistic offerings throughout the town ensures it retains surveillance into the evening. However, as with all town centres some secondary streets (St. Michaels Place, Pearse Street etc.) which do not have a strong retail presence possess a reduced level of natural surveillance.

Diversity of Uses and Multiple Representation

Gorey town centre has a strong diversity of uses with a particularly strong representation from the comparison goods sector – clothes, gifts, footwear etc. The high level of comparison goods shops is concentrated primarily in the retail core and Gorey Shopping Centre. Independent retailers occupy the vast majority of units located within the retail core with national multiples including Dunnes Stores, Tesco, Lidl and Aldi concentrated at edge of centre locations. Bulky goods retailers are primarily located at Knockmullen Retail Park and Ballyloughlan out of centre locations.

The breakdown of uses within the Retail study area of Gorey comprise of 26% comparison goods, 8% convenience and 4% bulky goods. There is also a healthy range of complementary services including hair and beauty, dry cleaners, opticians, a medical centre, post office, banking services and civic/amenity related uses situated in and around the retail core of Main Street. This complimentary commercial offering within the town's study area equates to 55% of the total number of retail or commercial units. Most occupied units are small independent retailers with some specialist gift stores (wool gallery, stationery, gift shops, and several high-end ladies' boutiques). These stores are supplemented by a small range of national multiples including Sports Direct, Regatta, Boots, and Eason's.

Table 4.6 Diversity of Uses – Retail Type Share (Gorey Retail Study Area)

Gorey	No. of Units	Unit (%)
Bulky	16	4%
Comparison	95	27%
Convenience	32	9%
Other Commercial	196	55%
Vacant	19	5%
Grand Total	358	

Levels of Vacancy

Gorey town centre is a vibrant and bustling place with a very high level of occupancy. There is only a small number of vacant units within the town centre with vacancy rates at 5%. This presents some all be it limited opportunities for new retailers to gain a presence in a strategically positioned and prosperous town.

Shopping Rents and Commercial Yields

Prime Main Street retail rent in Gorey is considered to be in the region of between €25-30 per square foot based on an analysis of the market in January 2020[27]. Typical Main Street units would have a commercial yield in the region of between 6%–7%. Retail provision

[27] Data on shopping rents and yields obtained from Sherry FitzGerald – Haythornwaite for Wexford Town, Sherry FitzGerald - O'Leary Kinsella for Gorey, Sherry FitzGerald - O'Leary Kinsella for Enniscorthy and Sherry FitzGerald - Radford Auctioneers for New Ross.

located on secondary streets achieve lower rental values with Esmonde Street levels at circa €20 per square foot while secondary side streets garner in the region of €15 per square foot. Other specific factors such as size, characteristics, and number of sharing tenants could result in slightly adjusted achievable values but the above provides an informed view of the local market as of January 2020[28].

Key Actions and recommendations

Gorey has a very well-functioning retail sector with a particularly strong offering and enviable reputation for comparison goods most notably in women's fashion. Gorey is also a walkable town and has a pleasant and well-maintained public realm. Recommendations to further enhance Gorey's attractiveness and appeal as a retail destination are set out below:

- Examine the introduction of up to three pedestrian priority crossings along Main Street to further promote pedestrian activity within the town and retail centre. Locations as follows:
    - To the front of Ulster Bank on Main Street (where a pedestrian island already exists)
    - To the front of McGovern's bar on Main Street
    - To the front of Katie Daly's bar and restaurant (replace traffic lights)
- Replace the pavement and hard landscaping along Main Street. Consider using the hard surface treatments that has been successfully incorporated along The Avenue
- Support the implementation of the 'Access and Movement Objectives' outlined in the Gorey Local Area Plan, including the proposed footpath and cycle networks and the provision of a public transport hub
- Consider an audit of the existing bus stops within the town to appraise their existing functionality and provide recommendations that could improve the public transport network within Gorey

[28] Ibid

- Directional signage from Gorey shopping centre to the town centre could be improved
- Review and reduce wirescape within the town centre (if possible) which currently serves to detract from the attractiveness of the core retail area
- Consider rearrangement of market square and improve its public realm offering through provision of soft landscaping to aid in making it a destination point within the town
- Provide lighting underneath the railway bridge along Esmonde Street to improve surveillance and safety for pedestrians who utilise this route
- Incentivise owners to make improvements to their buildings/shopfronts within the retail core through grant funding for a 'Shopfront Improvement Scheme'
- Adopt a 'Shopfront Improvement Scheme' Planning Guidance Note outlining; eligibility, grant funding, design principles criteria etc. to encourage use of the scheme
- Continue to support the established festivals and events that take place within Gorey and consider opportunities for further events.

4.5 New Ross Town

Introduction

New Ross in the southwest of the County is located on the River Barrow, approximately 34km from Wexford Town. Dating from the pre-middle ages the town has a rich built heritage and distinctiveness consistent with its medieval roots. This is evidenced to this day through the principal structural layout of the town. There are two main focal areas within the town – the Quays and the main commercial and retail area centred around South Street.

The attractive riverside setting is enhanced by a public walkway which runs along the stretch of riverbank from the John F. Kennedy Memorial Statue to the Dunbrody Visitor Centre and beyond. On the opposite side of the R723 leading to the town centre, the majority of the distinctive quay front buildings have been retained, hosting a range of uses at ground floor level.

The main streets, retail core and principle services and facilities are situated east of the river with some commercial and residential uses to the west. Convenience and comparison retail are concentrated primarily on South Street extending up to North Street with some activity on Charles Street and Quay Street leading down to the quays. The medieval street pattern is characterised by a mix of retail, commercial and residential uses. Many of the retailers situated within the town centre are 2nd and 3rd generation family businesses and this is evident in the traditional style shop fronts typical of a rural Irish town. Also located within the centre, are a number of cafes and restaurants and some cultural, religious and civic uses.

The New Ross Municipal District Offices located on the corner of North Street and Mary Street occupy the classical Tholsel building that acts as a civic focal point within the town, fronted by a monument erected in the memory of the 'Battle of New Ross 1798' which serves to add to the buildings sense of importance.

Attractions

The town has several notable tourism sites that attract a high volume of visitors particularly during the summer months. These include the Dunbrody Famine Ship Experience and Restaurant and the John F. Kennedy memorial statue erected in 2008 as a commemoration of the 45th anniversary of President Kennedy's visit to the town. The Emigrant Flame commemorating emigrants of the famine is situated alongside the visitor centre adding further to the appeal of New Ross as a cultural heritage destination. These attractions are located along the quayside which has benefited from recent investment in its public realm to provide high quality hard and soft landscaping which complement its setting within the town and along the River Barrow.

The Quay is also the location of an exhibition hosting the Ros Tapestry. The Ros Tapestry is the creation of a community project that has inspired over 150 volunteers to produce fifteen striking embroidered panels depicting events around the Anglo-Norman arrival to the South East and the founding of New Ross.

The recent opening of Kennedy's Boutique Hotel enhances the vibrancy of the quay front location in which it is situated. The Brandon House Hotel and Solas Croí Eco Spa located on the outskirts of the town as well as several B&Bs offer a choice of accommodation to visitors.

Further attractions to the town are St Marys Church and Medieval Abbey which is a National Monument and acts as the final destination along the Norman Way heritage trail that runs across the south coast of County Wexford. This attraction has also seen recent high-quality improvements to the public realm and car park area which fronts it, including new pavement and road surfacing treatments and the installation of cycle stands. A new pedestrian walkway and interpretation panels within the confines of the site also add to the attractiveness and accessibility of the site. During the survey visit it was also noted that new dedicated signage was in the process of being installed to direct patrons of the Norman Way and medieval trail to St Marys Church and Medieval Abbey, this is a positive and welcomed enhancement to fully utilise this heritage asset.

Despite the presence of these tourism centres and the additional visitors they attract to the town, the feedback received at the public consultation meeting indicates that attracting visitors to stay longer in the town and to browse the local shops on South and North Street is challenging and a more concerted effort is needed to disperse the benefits of tourism to local retailers and business owners.

Wexford County Council, in partnership with Fáilte Ireland and the JFK Dunbrody Trust have recently secured €5.56 million worth of funding to transform New Ross Town's tourist offering through the ‘New Ross Tourism Transformational Project’. This project will see the development of three visitor attractions in New Ross in a plan that combines the renewal of prominent town-centre sites with enhancing tourism experiences (The Norman Way – a upgrading of the town’s historical trail and redevelopment at High Hill, The Dunbrody Famine Ship Experience Transformation, and a new Norman Knight visitor attraction on the South Quay).

Another noteworthy attraction in the town is the Library Park which has received a ‘Green Flag’ award[29]. Located adjacent to New Ross Library and between Mary and Michael Street, the park was designed by Mary Reynolds a Wexford native and former gold medal winner of the Chelsea flower show.

In terms of festivals, the New Ross Piano festival takes place during the month of September, along with the Kennedy Summer School and Festival of Irish and American

[29] The benchmark standard for the management of recreational outdoor spaces

history, culture and politics also being held in the same month. These events are followed by the Eugene O' Neill International Festival of Theatre which takes place in October. A weekly farmers' market also takes place along the Quay on Saturdays.

Accessibility and Pedestrian Flows

The road network serving New Ross comprises the N25 National Primary Route that connects the town to Waterford City and to Rosslare Europort, and the N30 National Primary Road that links the town to Enniscorthy and from there to the N11 National Primary Route that leads to the M11 Motorway to Dublin. The regional R700 connects New Ross to Kilkenny. The N25 New Ross Bypass links the existing N25 at Glenmore to the R733 via a new River Barrow Bridge Crossing officially opened in January 2020 and further serves to enhance the connectivity of New Ross. It has also facilitated a reduction in unnecessary traffic through the centre of New Ross.

There are good quality public transport bus linkages connecting the town to major urban centres and to local in-County destinations. There are two sheltered bus stops on the Quays which are served by a Bus Éireann Expressway service linking Rosslare and Dublin to Waterford via Wexford and New Ross. Bus Éireann also provide a local bus service serving Waterford, Duncannon, Fethard on Sea and Wellingtonbridge. Wexford Bus operates a service to destinations such as Wexford Town, Waterford, Dublin City Centre and Dublin Airport. Kilbride Coaches run a regular service between Kilkenny and New Ross via Inistioge. A Local Link Bus provides a connection to and from New Ross, Enniscorthy and Tullow in County Carlow with stops in Bunclody, Clonroche and other rural villages. Local Link Wexford also operates a Demand Responsive Transport (DRT) service for which routes vary according to passenger demand and bookings. These services have the ability to pick passengers up from their homes and generally operate one or two days each week. The town is also served by some local private bus operators. Taxi and hackney firms are also available.

There is ample car parking provision within the town. For drivers approaching from the north, there is a small car park on North Street and on-street parking to one side. A large public car park with pedestrian laneway link to South Street is also provided at Barrack Lane to the rear of Scoil Naomh Ioseph situated to the immediate east of South Street. South Street can also be accessed via pedestrian laneway link from the Quayside car park serving Supervalu. Parking is also provided along the west side of South Street. Ample parking is also available along the Quays from the Bridge to the Dunbrody Centre and two large car parks are situated opposite the Dunbrody Centre on the Quays.

Most car parks are reasonably well signposted from key entry points to the town. From the quays signage to the town centre is mostly targeted towards motorists with limited signage for pedestrians at key arrival points such as the Dunbrody Centre and car parks on the Quays and in the general vicinity. Five pedestrian crossings are in place to assist movements from the quays to the town centre.

To the eastern side of the retail core the topography of the town becomes challenging, with a relatively steep incline to the previously mentioned attractions of the Library Park and St Marys Church and Medieval Abbey. Footfall on the day of the health check was relatively low and mostly confined to South Street where bollards line the streets to delineate the road and pedestrian footpaths. No pedestrianised zones currently exist within the town centre.

To inform the health check and understand the key areas of shopper activity, three pedestrian counts were undertaken in New Ross, the locations of which are identified in Figure 4.4 below:

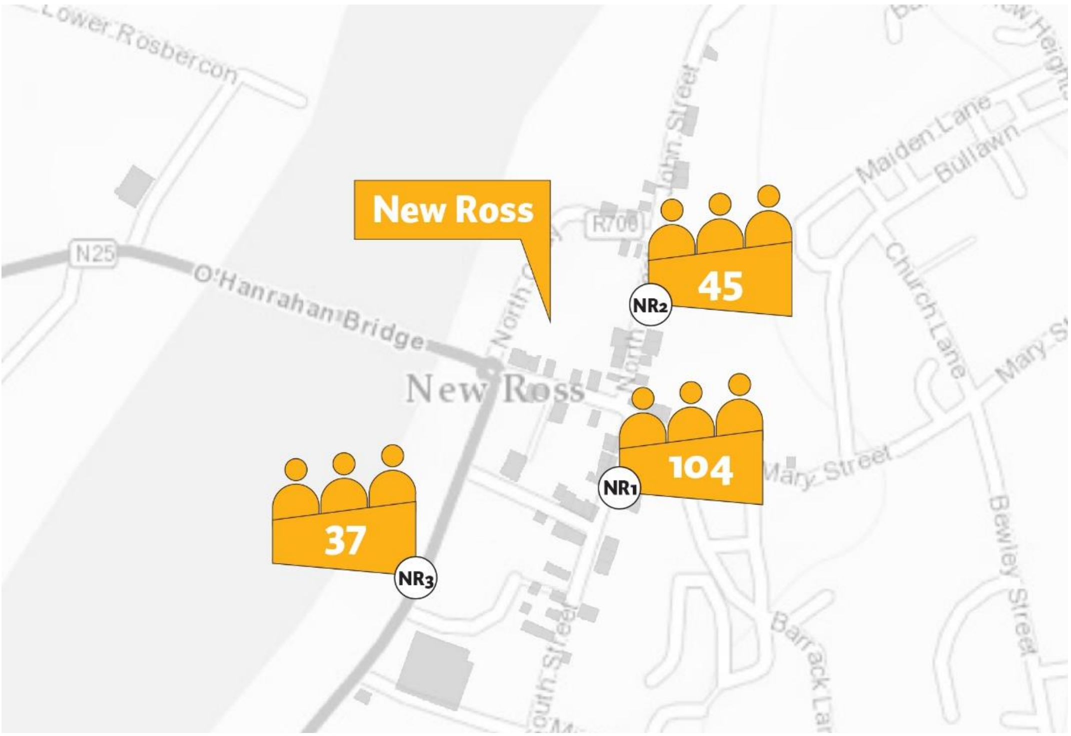


Figure 4.4: New Ross Pedestrian Counts

The results of the pedestrian counts undertaken in New Ross Town over the course of January 11th and 12th 2018 and 26th May 2018 for 15-minute intervals in the morning, lunchtime and afternoon are set in Table 4.7 below. Full details can be seen in Appendix A.

Table 4.7: New Ross Pedestrian Counts

Pedestrian Count Location Ref	NR1	NR2	NR3
Location Description	South Main Street close to O'Brien's café	North Main Street close to Discount Store	The Quay close to the Supervalu
Average Count	104	45	37
Peak Count	135	70	52

The highest average and peak footfall counts were recorded on South Street with the busiest (peak) time recorded being 135 people at 11am on Saturday 26th May. It was noted that the nearby Nutshell Café was a significant footfall attractor on this morning. North Street was much quieter in general with the busiest period also occurring on Saturday morning. It was noted that pedestrian activity on the quays was mostly generated by the presence of Supervalu and the Quay car park and nearby ATM. Peak count at this location was recorded at 4pm on Friday afternoon.

Environmental Quality and Amenity

Physical landscape features namely the River Barrow to the west and hilly topography to the east provide the natural boundaries of the town centre which has aided to the development of a linear north/south street pattern.

Amenity and landscaped areas are primarily concentrated along the river side for which a dedicated public realm improvement plan was delivered in recent years. There are a number of seating areas along the quays from which residents and visitors can enjoy the natural amenity of the River and take in the views of the Dunbrody Famine Ship. A landscaped area forms a natural separation between the hard edge of the car park that runs along the quays and the riverside walkway. The Library Park previously mentioned also provides a high-quality landscaped amenity space within the town for locals and visitors however its potential could be further enhanced.

Within the town centre core retail area of North and South Street, work has been carried out to enhance the streetscape with flower boxes and planting. Attractive cast iron streetlights are interspersed along South and North Street and the side streets leading to the quays. At the time of the survey, the town was generally well kept with minimal signs of littering. Vacant retail and commercial units are evident on all streets which without maintenance measures will deteriorate and detract from the vibrancy of the streetscape.

The town displays high architectural quality with a range of building styles reflecting the various phases during which the town developed with the Tholsel, Courthouse, and ecclesiastical buildings among the town's most notable buildings. The streetscape is predominantly comprised of three and four storey buildings while ground floor uses (where many original shop fronts still exists) occupy a mix of retail, commercial and civic uses. This provides for a pleasant and attractive relationship between the scale of buildings, their architectural quality and building fabric within the primary retail core.

New Ross benefits from a broad variety of amenities and clubs with good sporting, leisure and recreational facilities including a swimming pool/leisure centre, the Library Park and Town Park, sports pitches and clubs and an 18-hole golf course. The River Barrow is also well utilised for recreational purposes with a marina and rowing, fishing, boating and river activities.

The New Ross greenway, the partnership project by Wexford, Kilkenny and Waterford County Council's to connect New Ross to Ferrybank has recently been granted planning permission and funding in the region of €8Million has been secured to enable its delivery. It is anticipated that construction on this project will start in mid-2020 providing the potential to further attract both domestic and international visitors to New Ross and the surrounding area. This will greatly enhance the environmental quality of New Ross and add to its amenity offering.

Perception of Safety

On the day in which the health check was conducted New Ross was a pleasant and secure town in which to traverse. The main streets (North and South Streets) are well observed during daytime business hours. As with all town centres some secondary streets (particularly those to the east) which do not have a strong retail presence have a reduced level of natural surveillance, however, this is as expected as you transition from the retail core towards streets which are predominately used for residential purposes.

Encouraging the greater use of the Library park would serve to bring greater footfall out of the town centre and increase natural surveillance of the park which is an important and high-quality amenity asset.

Diversity of Uses and Multiple Representation

A diverse range of uses are situated within the New Ross Retail study area. Comparison retail leads the retail offering with 16% of retail units in the town providing comparison services. 8% of the retail units are occupied by convenience goods stores, while 7% offer Bulky goods. 54% of units in the study area are occupied by non-retail commercial uses.

The comparison goods shopping offered in the retail core is primarily comprised of small independent retailers with a mix of clothes, foot ware, jewellery and accessories, newsagents, phone and electrical goods, gift and craft shops occupying units in the retail core of South Street and North Street. The retail element is complemented by a broad range of service related retailers that would be expected in a large rural town including hair and beauty, dry cleaners, opticians and medical centre, and civic/amenity related uses – community enterprise centre, youth café, a public library and an Arts Centre/Theatre. There are also a number of cafes, restaurants and pubs concentrated in and around the retail core of South Street and North Street. Financial and administrative institutions (Post Office, Credit Union, Banks) also occupy this space within the core retail area. The absence of a major comparison retailer within the core retail area was highlighted at the consultation meeting as a particular disadvantage for the town. The addition of a national comparison goods retailer, potentially sports related given the range of sporting clubs and facilities in the town, would strengthen New Ross's appeal as a retail destination and act as an anchor to draw customers into the town centre.

The main convenience goods retailer with a presence in the retail core is Supervalu. This is supplemented by a Lidl store and an Aldi store situated in edge of centre locations on the south side of the town centre, and a Tesco Superstore at the out of centre New Ross Retail Park on Woodbine Road.

New Ross has an impressive bulky goods offering. These tend to be located primarily in the retail parks on Woodbine Road – New Ross Retail Park, Woodbine Business Park and the N30 Business Park with homewares, wholesalers, garden and DIY stores being commonly present

A map showing the diversity of uses and the current location of convenience, comparison and bulky goods is set out in Section 6.2.4.

Table 4.8 Diversity of Uses – Retail Type Share (New Ross Retail Study Area)

New Ross	No. of Units	Unit (%)
Bulky	19	7%
Comparison	47	16%
Convenience	23	8%
Other Commercial	156	54%
Vacant	45	15%
Grand Total	358	

Levels of Vacancy

The core retail area of New Ross has a current commercial vacancy rate of 15%. Vacancy levels are particularly high on North Street with some units showing signs of deterioration. There are also several vacant buildings and some in poor condition on Quay Street and on Charles Street which connect the Quays to South Street.

Shopping Rents and Commercial Yields

Prime retail rent in New Ross' Town centre (North Street and South Street) are considered to be in the region of between €12-15 per square foot based on an analysis of the market in

January 2020[30]. Rental values for retail units do reduce when located on secondary streets to circa €8-10 per square foot. Other specific factors such as size, characteristics, and number of sharing tenants the building has etc. can further impact values.

Key Actions and recommendations

New Ross primarily functions as a retail centre for the Municipal District in which it is located and is not a retail destination of significance for the wider Wexford area. It's riverside setting, and recent works at the Quay and Library Park, JFK connections, Dunbrody Famine Centre and Norman heritage trail add greatly to the appeal of the town as a tourism destination and as previously discussed measures have already been identified by the County Council to further the towns potential in this regard. As such there are opportunities for retail traders in the town to elicit greater benefits. The new bypass further presents opportunities to reimagine the town centre as it will likely continue to result in a decreased vehicular movement through the town. A series of measures are proposed to encourage additional trade within the retail core area of South Street and North Street and to improve the overall condition and environment of the town centre:

- Consider pedestrianisation and public realm improvements (new attractive hard landscaping) of North Street to encourage pedestrian activity within the core retail area. This could be trialled initially to determine its success. If successful, the bollards which delineate pedestrian and vehicle movement on North street could be removed to reduce street clutter
- Consider providing a pedestrian priority crossing at the junction of North Street and Mary Street (directly to the front of the Tholsel building)
- Improve signage at strategic locations along the Quay to encourage people to move into the town centre

[30] Data on shopping rents and yields obtained from Sherry FitzGerald – Haythornwaite for Wexford Town, Sherry FitzGerald - O'Leary Kinsella for Gorey, Sherry FitzGerald - O'Leary Kinsella for Enniscorthy and Sherry FitzGerald - Radford Auctioneers for New Ross.

- Incentivise owners to make improvements to their buildings/shopfronts within the retail core through grant funding for a ‘Shopfront Improvement Scheme’
- Adopt a ‘Shopfront Improvement Scheme’. The scheme should be guided by a Planning Guidance Note outlining; eligibility, grant funding, design principles criteria etc. to encourage use of the scheme and to encourage the re-use of upper floors
- Review and reduce wirescape within the town centre (if possible) which currently serves to detract from the attractiveness of the core retail area
- Promote New Ross’s extensive bulky goods offering. This could enable it to become a regional destination for such goods and provide overspill activity within the town centre
- Support the provision of a community/local transport service to link the housing developments surrounding the town centre

4.6 Other Towns and Villages

This section presents the findings of a series of mini health assessments undertaken for the smaller settlements of Bunclody Town, Rosslare Harbour and Kilrane and Wellintonbridge.

4.6.1 Bunclody Town

Introduction

The town of Bunclody traverses the Wexford and Carlow County borders, situated approximately 30 kilometres south-east of Carlow Town, and 20 kilometres north of Enniscorthy. It lies along the N80 route that connects it to both towns. It is a substantial settlement that caters for the population in the surrounding hinterland as well as the residents of the town itself.

The character of Bunclody today reflects its original development as a planned estate village within the surrounds of a formal demesne landscape, which developed to a large extent in the eighteenth and nineteenth centuries. whilst later additions of the early twentieth century form an important representation of the urban vernacular; however, it remains a set piece of 18th Century urban design. The town is also very favourably located from an agricultural trade point of view with surrounding lands of superior quality well suited to tillage and arable framing. As a result, Bunclody developed as a market town.

The stone walls, arched bridges and mature trees coupled with views and vistas of Mount Leinster and the River Slaney, create a dramatic entrance approach to the town. The trees and distant hills frame the views into and out of the Mall/Main Street and Market Square, whilst the corner buildings create a definite entry into Market Square. The main feature of the town is the cascading stream down the centre of the mall, which is unique in Ireland.

The area derives its strength and character from a number of elements notably:

- Views & Vistas
- River Slaney
- River Clody
- Mount Leinster
- Demesne Landscape
- Landmark Buildings
- Streetscape Quality
- Public Spaces

The interplay of historic buildings, the formal urban spaces of the estate village and the urban vernacular streetscapes set within the context of a demesne landscape, form the particular character of the area that is unique to Bunclody. However, the aesthetic qualities of the area are threatened by several factors such as degraded spaces, gap sites, and the need for redevelopment of brownfield sites.

Bunclody Town acts as an important service centre to the settlement and wider rural area. Retail and commercial services are located primarily in the core retail area of the town, between lower Main Street and upper Main Street with residential extending out from there and some newer retail developments such as ‘Supervalu’ and other retail warehousing and offices located on the Carrigduff side of upper Main Street and Aldi and Mr Price on

Ryland Road (N80), to the south of the town centre. There is also a concentration of other commercial/industrial uses off Ryland Road and out the N80, and also outside the town boundary at locations such as the Slaney Meats factory at Clohamon.

Attractions

As discussed above, Bunclody's geographical location contributes to the popularity of the town as a service centre for neighbouring rural settlements. This is a key attractor to the town for those seeking to fulfil everyday retail, commercial and administrative (banking, post office etc.) needs. Slaney Country Market also takes place in Bunclody every Saturday from 10am-1pm.

The town's proximity to a number of active outdoor offerings further increases the appeal of Bunclody to visitors which is complimented by the presence of a tourist office within the town centre. Mount Leinster and the Nine Stone's viewing point are only 14km away while walkers can also avail of the close proximity to both the Kilbranish and Coolmeelagh Trail Walks.

Bunclody Golf and Fishing Club and the seasonal Bunclody Adventure Hub (water sports activity) add to the outdoor activities within Bunclody. These offerings coupled with a wide provision of free town centre parking add to Bunclody's credentials for locals and visitors alike.

Accessibility and Pedestrian Flows

Bunclody is located along the primary N80 road which connects to Carlow and Enniscorthy. Within the town centre itself a substantial quantity of free parking exists which is an attractive offering for commuters to the town and is a likely enabler to the towns overall commercial success.

Bunclody's public transport offering includes Bus Eireann's 132 route linking the town directly with Dublin City Centre via Tallaght, Blessington and Tullow. Wexford Bus provide a service to Carlow via Enniscorthy and Bunclody while there are also two Local Link Wexford Regular Rural Services (RRS) routes which operate through the town.

The town also provides for a pleasant pedestrian experience with wide footpaths set back from the main roads within the town centre and a number of pedestrian priority crossings linking Main street to the adjoining side streets which support pedestrian flows throughout the town, although opportunities exist to further pedestrian connectivity as discussed in the action and recommendations.

There are several pedestrian crossing points which support pedestrian flows throughout the town, although opportunities exist to further pedestrian connectivity.

Environmental Quality and Amenity

Bunclody town centre represents the successful planning of a town with its well-defined layout design and arrangement of urban form. The town centre is a picturesque and well-maintained environment with a tree lined mall stream providing the central focus where several benches are located and complimented by tree coverage which offers shoppers a pleasant environment to stop and rest while they shop.

Market Square at the eastern end of Main Street has benefitted from investment in its public realm with landscape treatments that have greatly enhanced the overall environment of the town. A parade of retail and commercial units which front onto Market Square to the north are showings signs of ageing and if redeveloped would further enhance the setting of the square.

Towards the west of the town on the edge of Main Street a pub/restaurant resides on a prominent site as you exit the town which is showing signs of ageing and disrepair. Other than that, the majority of buildings in the town are well maintained and in good condition, providing for attractive streetscape.

Diversity of Uses/Multiple Representation/Vacancy

On either side of Main street there are a number of boutique clothing stores, as well as a wide range of comparison and convenience offerings, along with other non-retail uses which help to contribute to a healthy and viable town centre (bars, cafes etc.).

The northern edge of the town (and within the confines of County Carlow) is the location of the Carrigduff Business Centre, which is adjacent to a Glanbia garden centre and large SuperValu supermarket.

The majority of the tenants within the town are independents with multiples represented by Eurospar, Vodafone, Boyles Sports and SuperValu. Outside of the town centre to the south multiples are represented by Aldi and Mr Price.

On the day of survey, it was noted that there are currently eight vacant units within the town. These vacancies have the potential to be used for either retail or other commercial uses.

Key Actions and recommendations

- Encourage redevelopment of the parade of units which front onto Market Square from the north to complement and establish the attractive public square again

- Creation of a pedestrian connection from Market Square toward the River Slaney to further enhance the amenity offering of the town centre
- Improve signage towards the River Slaney
- Investigate the formalisation, enhancement and making safe (with lighting, viewing barrier etc.) of the pedestrian link which already exists from Main Street to the River Clody (between Clody Lodge and the NCBI Charity shop) down to the Victorian Toilets subject to the Habitats Directive and protection of biodiversity and residential amenity
- Encourage the provision of a hotel or other visitor accommodation within Bunclody
- Incentivise owners to make improvements to their buildings/shopfronts within the retail core through grant funding for a 'Shopfront Improvement Scheme'.
- Adopt 'Shopfront Improvement Scheme' Planning Guidance Note outlining; eligibility, grant funding, design principles criteria etc. to encourage use of the scheme
- Consider implementation of traffic management measures along Main Street as visibility between parked cars and moving vehicles is reduced in proximity to the existing zebra crossings
- Support and ensure the retention of the Tourist Office within the town. Continue to circulate literature outlining the extents of the local walking routes and trails to encourage visitors to the town and surrounding area
- Support the work and objectives of the Bunclody Tidy Town's group and Bunclody's Town Team.

4.6.2 Wellingtonbridge

Introduction

Wellingtonbridge is situated in the southwest of County Wexford approximately 25 kilometres from New Ross and Wexford Town respectively. The R733 National Primary Road links Wellingtonbridge to Wexford Town while the R736 links the town with settlements such as New Ross, Duncormick, Kilmore Quay and Rosslare Harbour.

The town's name indicates its historic importance as the bridge crossing of the Corrock River, which flows into the picturesque Bannow Bay. Wellingtonbridge railway station historically served the village and surrounding area and was also important for transporting sugar beat until closure of this industry.

It was one of the main stops on the Rosslare Harbour to Waterford railway line, which closed in September 2010, it is now being proposed as a Greenway route between Rosslare and Waterford City. It is anticipated that a planning application for this proposed Greenway will be submitted to An Bord Pleanála in 2020.

Attractions

Wellingtonbridge serves a wide catchment area as a service centre which acts as its primary attractor. In that regard it serves a very important function as a district centre, accommodating the needs of a large surrounding rural hinterland.

Outside of facilitating the everyday retail and commercial needs of the residents within the village and surrounding area, the EuroVelo Cycle Route also passes through Wellingtonbridge. As such the village accommodates cycle stands and a public puncture repair stall which encourages cyclists to use the village as a stop off point along the route. Its location along the Norman Way heritage route and proximity to Bannow Bay further allow Wellingtonbridge to benefit from passing trade.

Accessibility and Pedestrian Flows

Wellingtonbridge enjoys a central location in southern Wexford. It is situated at the intersection of the R733 and the R736. The R733 links Wellingtonbridge to Wexford Town. The R736 links a number of villages in the south of Wexford with Wellingtonbridge and the N25 near Rosslare Harbour. The village is approximately 20-minute drive from both Wexford Town and New Ross.

Large car parks exist to the side and rear of the Super Valu and the Petrol filling station and ancillary commercial building within the town, while on-street car parking is also available directly in front of the main entrance to the Super Valu store.

Bus Eireann operate a bus service between Wexford town and Wellingtonbridge while it also forms part of the Local Link Wexford Regular Rural Services (RRS) route from Carrig on Bannow to Wexford. A Local Link Demand Responsive Transport (DRT) service also operates from Carrig on Bannow to Waterford which attracts a catchment from the northern section of the Hook Peninsula.

A dedicated public footpath does not exist directly outside of the Wallace's Super Valu (on the Southern side of the R733) which provides an awkward relationship between the on-street car parking in front of the store and pedestrian movements seeking to access the store via the main entrance, however the remainder of the village benefits from the provision of wide footpaths which are in a good state of repair.

Environmental Quality and Amenity

Wellingtonbridge benefits from its location on the banks of the Corrock River and it is proximate to Bannow Bay. However, there is an over dominance of vehicle car parking serves to detract from the environmental aesthetic as you enter the village from the east.

An attractive public amenity space which overlooks the Corock River on the northern side of the R733 directly opposite Super Valu provides an important and pleasing outdoor area within the village.

This area benefits from several picnic tables which encourage the use of the space. This location is used by cyclists who frequently pass through the town along the Eurovelo 1 Cycle Route. A cycle stand has been provided beside the picnic tables with a route map and a service installation allowing cyclists to make adjustments to their bikes including pumping tyres and tightening brakes.

A separate area for rest and relaxation is located slightly outside of the village centre at the junction of the R736 and Corrock Avenue where picnic tables and cycle stands have been incorporated to encourage its use.

Diversity of Uses and Multiple Representation

In terms of retail services, despite the relatively small area of land which makes up Wellingtonbridge village it provides for a comprehensive and impressive range of convenience and comparison retail services to the surrounding hinterland. The focal point of this is at the intersection of the R733 and the R736 where a SuperValu retail convenience store and adjoining retail comparison clothing department store are located.

There is also a pharmacy and petrol filling station with retail and office units above. A separate retail and commercial building to the west of the petrol station adds to the range of services within the village which include; a dentist, salon, optician, tattooist, beauty parlour, vets, coffee shop, public house, foot clinic and estate agents. To the south along the R736 a hairdresser, beauticians, undertakers, graphic design studio, bistro café and kitchen and bedroom showroom exist.

There is also a large hardware store with homewares and garden centre and an Agri Store outside of the centre of Wellingtonbridge along the R733 towards the R736 which both leads to New Ross.

At the time of the health check, there was only one vacant unit within the village. It is important that the existing services and retail provision in the town are maintained, as they play an important role for the large surrounding rural hinterland.

Key Actions and Recommendations

- Consider removing on-street car parking from the R733/L70691 intersection (at the east of the village) to the Super Valu store and provide a pedestrian footpath in its place. A new pedestrian footpath could connect to the existing pedestrian footpath to the west of the Super Valu store and removal of car parking bays in front of the Super Valu store will provide the opportunity to not only provide a pedestrian footpath, but also to improve the quality of the public realm and the incorporation of soft landscaping features and biodiversity enhancements on the southern side of the R733 directly in front of the department store

- Provide a pedestrian light-controlled crossing between the public house and the petrol station
- Encourage, (within the car parking area to the front of the vets,) the provision of a public footpath from the pedestrian controlled crossing to the front of the petrol station to allow for safe pedestrian access to the petrol station entrance
- Encourage, the redesign of the car park in front of the veterinary practice to enhance the public realm in the centre of Wellingtonbridge, and the incorporation of soft landscaping features (biodiversity enhancements) to break up the hardstanding and make this area more aesthetically pleasing. Use this opportunity to regulate the parking arrangement in this car park

4.6.3 Rosslare Harbour and Kilrane

Introduction

Rosslare Harbour is a village located 19km from Wexford Town and 175km from Dublin. It is connected to Dublin via railway and bus links and is home to Rosslare Europort. There is also a disused railway line from Rosslare Harbour to Waterford City which is expected to be the subject of a planning application submitted to An Bord Pleanála for the reuse of a disused railway line into a Greenway. Kilrane village is located 2km from Rosslare Harbour and is connected via the N25.

Attractions

Rosslare Europort is a major port in the south-east of Ireland which provides a gateway to Ireland from Britain and continental Europe (France). The Europort is operated by Iarnród Éireann and offers regular services via key ferry operators (Stena Line and Irish Ferries) to Fishguard and Pembroke, (England) Cherbourg and Roscoff (France). Brittany Ferries have also recently added a service to Bilboa.

The Europort provides opportunities for spin-off enterprises around the Harbour and in nearby towns, including freight / transport related industries, motor importation and tourism related services and facilities.

In terms of tourism Rosslare has a mix of accommodation, incorporating 1 hotel (Hotel Rosslare) and a range of guest houses/B&Bs and self-catering units. The EuroVelo cycle route starts close to Rosslare Harbour and is part of a long-distance European cycle trail. The Norman Way heritage trail which concludes in New Ross also runs through Rosslare. Rosslare Harbour beach and the small boat harbour are further attractions which bring people to the area.

Other notable activities in the area include Kirwan's Garden, the attractive coastal path, walking trails, nearby soft adventure (IOAC), marine activities, and golf. In addition, a number of enterprises are involved in the provision of food and beverage for the tourist and local market.

Accessibility and Pedestrian Flows

The N25 starts at Rosslare Harbour and forms the National Primary route to Cork and also connects with the N/M11 at Wexford Town which continues to Dublin, and then links to all other major roads/cities including Belfast. A railway line operated by Iarnród Éireann runs from the Europort complex to Dublin. The Europort is also served by regular bus services to a number of destinations including Wexford town, New Ross, Enniscorthy, Gorey, Dublin, Waterford and Cork.

Pedestrian and cyclist facilities around Rosslare Harbour and Kilrane are in need of improvement where a number of the footpaths in Rosslare Harbour and Kilrane are damaged and in need of repair. Repairs to street lighting is also required. Pedestrian access to the beach at Rosslare Harbour is also difficult and a ramp / steps to the beach are required.

Environmental Quality and Amenity

The environmental quality of Rosslare Harbour and Kilrane is influenced by beautiful open spaces, and landscaping. Examples of positive aspects of environmental quality include a Kirwan's Garden, the Memorial Garden and Village Walking Trail and Cliff walk, Rosslare Harbour Maritime Heritage Centre, the stunning beach and coastline.

There are some community facilities in this area including: the Railway Social Club; childcare facilities; Rosslare Harbour Lifeboat Station - RNLI; and Rosslare Rangers Soccer Club. There are also a number of active community groups in the locality such as Environment & Tidy Towns Group; Rosslare Harbour Men's Shed; KRH Tops; Railway Social Club; ICA, GAA, Soccer Club, St Paul's Athletics Club, Active Retirement Group, Small Boat Owners.

Diversity of Uses and Multiple Representation

Rosslare Harbour has a number of businesses, largely connected to the Europort. In addition, it has a range of retail outlets that service the needs of the local community and passing traffic. There is also a large, well-used, SuperValu Supermarket. Examples of the type of businesses located in Rosslare Harbour include: hotels, B&Bs, cafes, garages, filling station/shops, car-hire companies, supermarket, bank, convenience stores, pharmacy, restaurants, childcare facilities, fast-food outlets, hair salons, fuel business, hardware store, public houses, charity shop, boat hire.

Within Kilrane village there are several retail outlets including 2 public houses, B&Bs, Kilrane Crafters and Rosslare Harbour Maritime Heritage Centre. This village also has a National School and several housing estates. The community centre is in the old school in Kilrane and is well used. In addition, there is a child-care facility based in the old school building. The International Outdoor Adventure Centre is located in nearby Tagoat.

Levels of Vacancy

Rosslare Harbour Village has a high proportion of vacant street level commercial property. Prominent among the sectors included in this vacancy is the high proportion of derelict/vacant former hotel sites in the village. This reality has a detrimental impact on the local community, visitors to the area, and actions designed to bring new enterprises and economic activity to the area.

Key Actions and Recommendations

- Encourage and support site owners to bring back into use the derelict sites in Rosslare Harbour Village
- Repair, upgrade and establish new footpaths in both Rosslare Harbour and Kilrane
- Establish a pedestrian crossing and a bus shelter in Kilrane Village
- Explore safer pedestrian crossing options in Rosslare Harbour at SuperValu
- Prepare a Public Realm Plan to create a space in Rosslare Harbour Village that can serve as a focal point for the community and visitors
- Establish a marketing and social media campaign to promote the area as a tourism, community and enterprise location of choice
- Continue to utilise the legislation to deal with derelict sites and the Urban Regeneration and Housing Act 2015 to achieve regeneration.
- Promote brownfield redevelopment within the settlement boundary
- Rationalise lighting, signage, wirescape and street furniture.

5.0 Projected Retail Floorspace Requirements

5.1 Introduction

This section will provide a summary overview of the quantitative assessment undertaken to model for likely future floorspace requirements across the County for the period 2021-2027. The assessment takes account of emerging trends in the retail market (as discussed in Chapter 2), estimates of future demand, projected changes in the population, consumer spending, existing turnover generation and the capacity for future floorspace potential.

It is important to note that the estimates of future requirements for retail floorspace herein are intended to provide broad guidance as to the additional quantum of convenience and comparison goods floorspace which could be sustained at healthy levels of trading. They should not be treated in an overly prescriptive manner, nor should they serve to inhibit competition - as per the requirements of the *Retail Planning Guidelines* (2012).

The assessment is set out for each of the three key retail types: Convenience, Comparison Non-Bulky and Comparison Bulky. Figures may be rounded in the tables included within this chapter. The base year and price year are set in 2020, unless otherwise stated.

An estimate of a future retail floorspace potential is derived for the four main retail catchment areas of the county, and the aggregate sum of these is also provided for a County-total of same.

Methodological Approach

The following approach describes the step by step methodology used in the assessment of existing and future retail floorspace capacity across County Wexford:

Step 1: Establish catchment areas of assessment and utilise the agreed population forecasts in base, period and design years;

Step 2: Estimate the available expenditure per capita for each of the retail categories (convenience, comparison and bulky goods) at the base year and design year;

Step 3: Compile a projection of the total available expenditure in the base year and design year for residents to allow for assumed expenditure inflows and outflows;

Step 4: Undertake a projection of the anticipated change in available expenditure (accounting for identified inflows and outflows) which will support the provision of additional floorspace;

Step 5: Estimate the indicative turnover of existing floorspace in convenience, comparison and bulky goods;

Step 6: Estimate the representative turnover of existing floorspace in convenience, comparison and bulky goods;

Step 7: Compile a breakdown of vacant floorspace and estimate the assumed retail allocation;

Step 8: Derive the residual surplus or shortfall between adjusted available expenditure and assumed future turnover;

Step 9: Summarise the capacity potential for additional floorspace across each of the three retail categories, and account for a vacancy;

Defining Catchment Areas

For the purposes of this assessment County Wexford has been sub-divided into four distinct retail catchment areas, namely, the Wexford Catchment, the Enniscorthy Catchment, the Gorey Catchment and the New Ross Catchment.

The catchment areas have been defined using an assessment of driving time accessibility extending outwards from each of the four key towns. Different time-thresholds were examined, and a 20-minute extent was selected as the optimal catchment delineator given it both minimised overlaps, while also maximising population reach within an accessible time period. The driving time extents are shown in Figure 5.1. The assessment was undertaken before the opening of the M11 Enniscorthy to Gorey scheme (August 2019) and the N25 New Ross Bypass (January 2020).

In order to determine the corresponding population within each catchment area, an assessment of electoral divisions was undertaken, and a best-fit approach adopted to inform the final catchment boundaries, as shown in Figure 5.2.

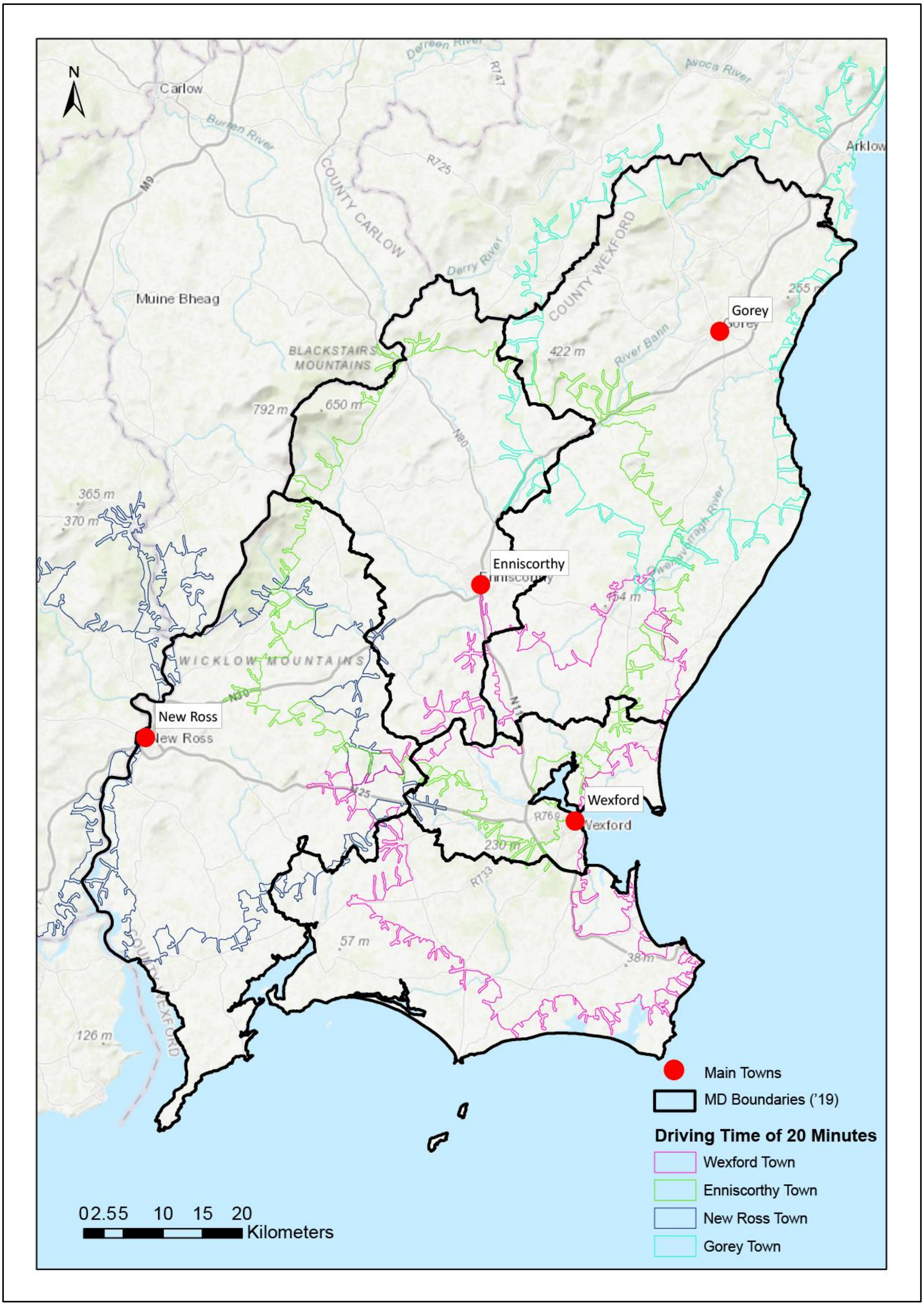


Figure 5.1: Overlapping 20-minute driving time reach from Wexford Town, Gorey, Enniscorthy and New Ross.

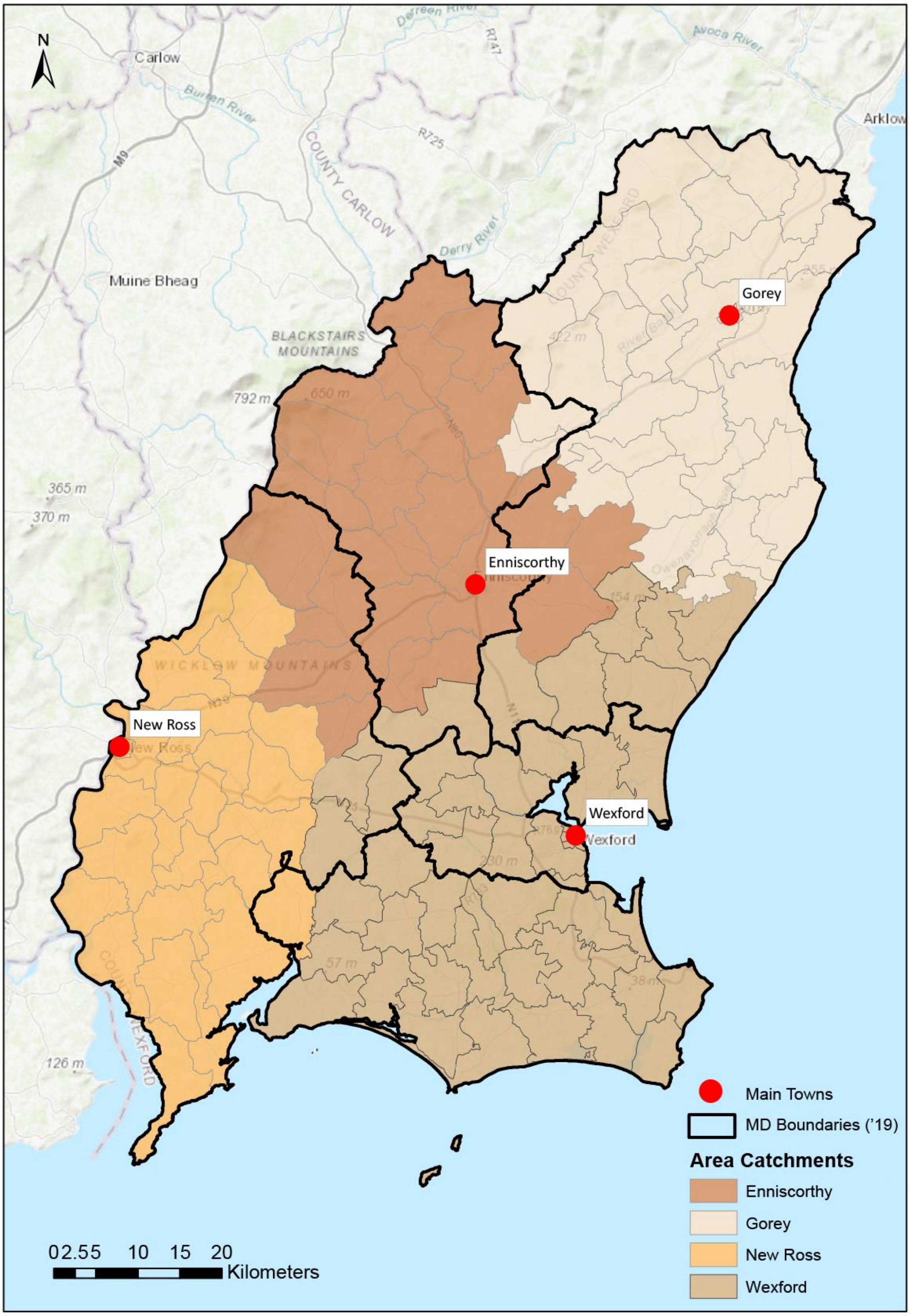


Figure 5.2: Electoral Division allocation to catchment areas.

As can be observed, the catchment areas do differ from the Municipal District (MD) boundaries. The Gorey catchment occupies approximately half of the Gorey MD. The Enniscorthy catchment largely covers its MD, but extends partially into both the Gorey MD and the New Ross MD. The New Ross catchment is largely contained within the New Ross MD, with only a slight reach into the Rosslare MD. The Wexford catchment extents into all other MDs.

Buildings and Floorspace Survey

A buildings-use and floorspace survey was undertaken in 2019 in each of the four main towns. It was subsequently updated in 2020. The survey identified the main retail areas within the towns, as well as their environs.

The survey identified what the primary use of all individual buildings where in within these areas; covering residential, commercial and retail units. Of the three retail categories used in this assessment (convenience goods, comparison non-bulky goods and comparison bulky goods), the survey identified the type of goods sold by the trader, whether the trader was an independent, multiple or other, the net floorspace of the unit, its occupancy status, as well as other descriptive data.

1,584 properties in total were catalogued as part of the survey.

- 903 were commercial units falling outside of required assessment
- 517 were retail units of interest
- 164 were vacant units

All retail units were visited to assess their net floorspace area. In 11 cases, no access was possible, and these units have had their floorspace estimated based on desktop assessment.

5.2 Catchment Population

The population for each catchment area was developed by summing the population of the identified electoral divisions in each catchment. Future forecasted population was developed by holding each catchment's Census 2016 proportional share of total population fixed, whilst applying the county level growth rate according to the agreed NPF trajectory.

The forecasted population for each catchment is shown in Table 5.1 below.

Table 5.1: Population in Catchment Areas and County

Population in Catchment Areas and County					
Year	Census	Estimated Population Under County NPF Allocation			
	2016	2020	2021	2027	2031
Enniscorthy					
Population	**31,123**	**32,476**	**32,815**	**34,777**	**35,858**
Change #	-	1,353	1,692	1,962	1,081
Change %	-	4.3%	5.4%	6.0%	3.1%
Gorey					
Population	**35,928**	**37,490**	**37,881**	**40,146**	**41,394**
Change #	-	1,562	1,953	2,265	1,248
Change %	-	4.3%	5.4%	6.0%	3.1%
New Ross					
Population	**23,387**	**24,404**	**24,658**	**26,133**	**26,945**
Change #	-	1,017	1,271	1,474	812
Change %	-	4.3%	5.4%	6.0%	3.1%
Wexford					
Population	**59,284**	**61,862**	**62,506**	**66,244**	**68,304**
Change #	-	2,578	3,222	3,738	2,060
Change %	-	4.3%	5.4%	6.0%	3.1%
Wexford County					
Population	**149,722**	**156,232**	**157,860**	**167,300**	**172,501**
Change #	-	6,510	8,138	9,440	5,201
Change %	-	4.3%	5.4%	6.0%	3.1%

5.3 Expenditure Estimates

Expenditure per capita is used to determine what the available spend is in each catchment area. It is calculated by using published data on retail turnover from the CSO Annual Services Inquiry (ASI). As of the preparation date of this assessment, the latest ASI figures were published in 2019 and reflect a distilled view of national account data to 2017. They detail the gross estimates in the principal trading aggregates at national level for all enterprises in the relevant retail sectors as set out in the Retail Planning Guidelines. Table 5.2 illustrates the results of this exercise. Turnover aggregates as related to sectors specifically classed as either convenience, comparison or bulky goods retail are selected[31].

Table 5.2: Determination of Convenience and Comparison Retail Sales Turnover

Determination of Convenience and Comparison Retail Sales Turnover			
Retail Goods (State: 2017 Latest Year)	**Turnover Excl. VAT (€'000) - 2017**	**VAT on Turnover (€'000) - 2017**	**Turnover Incl. VAT (€'000) - 2017**
Convenience Goods			
Convenience Goods Sales in Non-Specialised Stores	€13,813,525	€2,899,770	€16,713,295
Convenience Goods Sales in Specialised Stores	€1,802,107	€380,130	€2,182,237
Total of Convenience Goods	**€15,615,632**	**€3,279,900**	**€18,895,532**
Comparison Goods			
Comparison Goods Sales in Non-Specialised Stores	€2,437,681	€511,724	€2,949,405
Comparison Goods Sales in Specialised Stores	€17,344,019	€3,895,667	€21,239,686
Total of Comparison Goods	**€19,781,700**	**€4,407,391**	**€24,189,091**
Overall Total	**€35,397,332**	**€7,687,291**	**€43,084,623**

[31] A splitting of *retail sales in non-specialised stores* between convenience and comparison has been incorporated on the basis of an 85:15 split towards convenience. This was informed by further specific breakdowns of retail sales by the CSO, isolating Department Stores from convenience sales.

As the data is only available at State level, an adjustment is made to localise the retail sales to County Wexford's spatial scale. This is achieved by applying a county-level per capita income adjustment to Wexford in the same base year (2017). This is done by using the CSO's publication on County Incomes and Regional GDP (published February 2020), which indicated that per capita incomes in County Wexford were approximately 87.6% that of the State in 2017. Further adjustments are made to this figure to bring it forward, year on year, to 2020 by incorporating both historic economic growth and inflation. Across the period, change in per capita spend per retail type has been forecast in line with an economic outlook informed by a review of existing literature. An account has been made for the near-term impacts of COVID-19 on economic growth.

Per capita spend has been set out on an annual basis for each retail type from 2017 to 2031 in Table 5.3 below. Based on the 2019 ASI, it has been estimated that the total expenditure per capita in 2020 on convenience goods in Wexford will be €3,613 and €4,625 for comparison goods.

Table 5.3: Determination of Per Capita Expenditure on Convenience and Comparison Retail Goods

Determination of Per Capita Expenditure on Convenience and Comparison Retail Goods					
Year	**Annual Growth Rate GDP (%)**		**Per Capita Expenditure (€)**		**Inflation**
	Convenience	**Comparison**	**Convenience**	**Comparison**	**CPI**
2017	*Indexed at 87.64% of State*		€3,455	€4,423	-
2018	8.20%	8.20%	€3,757	€4,810	0.5%
2019	5.50%	5.50%	€4,000	€5,120	0.9%
2020	-9.40%	-9.40%	€3,613	€4,625	-0.3%
2021	**6.40%**	**6.40%**	**€3,844**	**€4,921**	**-**
2022	**2.80%**	**2.80%**	**€3,952**	**€5,059**	**-**
2023	**2.70%**	**2.70%**	**€4,059**	**€5,196**	**-**
2024	**2.50%**	**2.50%**	**€4,160**	**€5,325**	**-**
2025	**2.50%**	**2.50%**	**€4,264**	**€5,459**	**-**
2026	**2.50%**	**2.50%**	**€4,371**	**€5,595**	**-**
2027	**2.50%**	**2.50%**	**€4,480**	**€5,735**	**-**
2028	2.50%	2.50%	€4,592	€5,878	-
2029	2.50%	2.50%	€4,707	€6,025	-
2030	2.50%	2.50%	€4,824	€6,176	-
2031	2.50%	2.50%	€4,945	€6,330	-

The figures set out in Table 5.2 above illustrate that the estimated convenience and comparison expenditure per capita are anticipated to grow over the period, after a near-term reduction due to COVID-19. Expenditure growth in comparison goods has been increasing in recent years.

This may be due to the need for convenience goods largely being met for households in broad terms, coupled with minimal price inflation on those goods over the last decade. Whereas, comparison goods shopping has increased with sales in clothing, footwear, household goods and especially electrical goods on the rise.

5.4 Total Available Expenditure

The total available expenditure within each catchment area is calculated by multiplying the catchment population by the expenditure per capita for each retail category, for each year.

In considering the above expenditure levels, it is important to note that significantly different levels of turnover will apply to comparison goods such as clothing and footwear and smaller household durables than would apply to bulky household goods sold in retail warehouses.

Retail warehouses have a distinct function and are generally located outside of a city or town centre. It is considered important to split between expenditure available for bulky household goods and non-bulky comparison goods as a result. Therefore, having regard to the CSO Household Budget Survey, the CSO Annual Services Inquiry and market research, it is estimated that approximately 20% of comparison expenditure can be accounted for by bulky goods. This split can be observed in Table 5.4 below for years 2020, 2021, 2027 and 2031.

Table 5.4: Total Available Expenditure (At Projected 2020 Prices)

Total Available Expenditure (At Projected 2020 Prices)			
Year	**Convenience Total Available Expenditure (€)**	**Comparison Non-Bulky Total Available Expenditure (€)**	**Comparison Bulky Total Available Expenditure (€)**
Enniscorthy			
2020	116,113,881	118,914,429	29,728,607
2021	**124,845,813**	**127,856,965**	**31,964,241**
2027	**154,585,538**	**158,313,982**	**39,578,495**
2031	175,980,019	180,224,476	45,056,119
Gorey			
2020	134,040,405	137,273,322	34,318,330
2021	**144,120,437**	**147,596,474**	**36,899,118**
2027	**178,451,602**	**182,755,671**	**45,688,918**
2031	203,149,122	208,048,870	52,012,217
New Ross			
2020	87,252,365	89,356,802	22,339,200
2021	**93,813,868**	**96,076,562**	**24,019,141**
2027	**116,161,423**	**118,963,117**	**29,740,779**
2031	132,238,046	135,427,492	33,856,873
Wexford			
2020	221,177,115	226,511,679	56,627,920
2021	**237,809,953**	**243,545,684**	**60,886,421**
2027	**294,459,050**	**301,561,100**	**75,390,275**
2031	335,211,883	343,296,849	85,824,212
Wexford County			
2020	558,583,765	572,056,231	143,014,058
2021	**600,590,071**	**615,075,686**	**153,768,921**
2027	**743,657,613**	**761,593,870**	**190,398,467**
2031	846,579,070	866,997,686	216,749,422

It is estimated that there will be a €326.2 million increase in unadjusted available expenditure in the County over the period 2021 to 2027; or 23.8%. With similar increases across the catchments in percentage terms (as they share the County profile). This reflects a period increase of €143 million in convenience available expenditure, €146.5 million in comparison non-bulky and €36.6 million in comparison bulky.

5.5 Adjusted Expenditure

Total available expenditure by retail type is subject to localised trade draw and leakage. Adjustments to total expenditure are therefore required in order to take account of the levels of inflow and outflow affecting the market in each catchment (both intra-catchment flows and flows into and out of the county as a whole). The results of the telephone survey, shopper's survey and online survey were utilised in this regard to provide percentage share inflows and outflows for each catchment, which are set out in summary below:

Table 5.5: Identified Inflows and Outflows

Identified Inflows and Outflows						
Area	Convenience		Comparison		Bulky	
	% Outflow	% Inflow	% Outflow	% Inflow	% Outflow	% Inflow
Enniscorthy	6.4%	11.2%	19.7%	9.3%	18.4%	2.7%
Gorey	1.9%	11.1%	6.7%	9.7%	5.4%	4.1%
New Ross	4.3%	10.0%	16.7%	8.5%	12.5%	3.0%
Wexford	1.6%	17.3%	3.6%	36.1%	5.3%	24.8%
Wexford County	2.2%	9.4%	16.9%	8.5%	15.4%	2.1%

Each area displays its own characteristics nuances, with the figures accounting for intra-catchment flows as well as out of county leakage. Higher trade draw or inflow is typically a characteristic of centres that are higher in the retail hierarchy. Further analysis of these interactions can be found is Chapter 3.

At county level, convenience inflow is largely unchanged since 2011 (9.4% vs 9.3%). Convenience outflow has fallen from 4.8% in 2011 to 2.2%. Comparison inflow in 2011 was a combined 8.3%, it is now between 8.5% for non-bulky and 2.1% for bulky goods. Comparison outflow in 2011 was 27.8%, whereas this is now between 16.9% for non-bulky and 15.4% for bulky goods. For the purposes of adjusting the available expenditure, the inflows and outflows above do not account for online shopping, which have been assumed as additive outflows of:

- 4% for convenience goods;
- 7% for comparison non-bulky goods; and

- 10% for comparison bulky goods.

These rates reflect commentary on the increasing market-share of online across all retail types; perhaps particularly expanded due to the COVID-19 circumstances. Information on specific market share as applies locally is not available unfortunately, but indications from both the Online Survey, conducted as part of this exercise, from Eurostat and from other sources, would indicate that increasing proportions of shoppers are going online to purchase goods.

67% of individuals surveyed by Eurostat in their 2019 E-commerce statistics publication saying that they had made an online purchase within the last 12 months[32], and figures relating to the UK market suggesting that in the region of 2% to 5% of market share comes from online grocery shopping[33].

The inflows and outflows are held fixed for the duration of the Plan period and for the purposes of this assessment. However, Chapter 6 outlines specific policies regarding the objective to reduce outflows were possible.

It should also be noted that the County-level inflows have been adjusted to include provision for additive tourist spend. This is premised on the relationship identified in the previous strategy, wherein the final inflow comprised an estimate of tourist spend summed with the identified proportion of non-residents who stated they were regularly shoppers.

[32]Eurostat E-commerce Statistics (May 2020). Accessible at https://ec.europa.eu/eurostat/statistics-explained/index.php/E-commerce_statistics_for_individuals#Most_popular_online_purchases
[33] See 'E-Commerce in Europe and Ireland' (August 2015). Accessible at http://exsite.ie/e-commerce-in-europe-and-ireland/

The relationship between these figures at the time appears to have been broadly similar, i.e. the additive tourist spend was slightly higher for convenience and very similar for comparison, when compared to the non-resident inflow. That relationship is carried forward now.

Under the previous strategy, 11.2% of survey respondents were non-resident, of which 26.7% were regular shoppers (i.e. 4.1104% of survey respondents). In the survey conducted for the current Strategy, this has now changed to 9.8% being non-resident, of which 47.9% are regular shoppers (i.e. 4.6942% of survey respondents).

Applying the same relationship as observed in the previous strategy, the comparison inflow in total is estimated therefore to be twice the non-resident inflow for same, and for convenience 2.25 times the non-resident for same. This estimation only serves to approximate likely spend and does not factor in changes to tourist volumes over time.

Table 5.6 overleaf sets out the adjusted total available expenditure resulting from the interaction of inflows and outflows, in each of the key point years, for convenience goods. It is followed by Table 5.7 and Table 5.8, which set out similar for comparison non-bulky and comparison bulky respectively.

In each table, where Wexford County figures are shown ("Wexford County *"), they reflect the aggregated sum of all catchment areas (they are not directly calculated).

Table 5.6: Adjusted Total Available Expenditure - Convenience Goods

Adjusted Total Available Expenditure - Convenience Goods					
Year	**Total Available Expenditure (€)**	**Outflow (%)**	**Inflow (%)**	**Online Outflow (%)**	**Adjusted Total Available Expenditure (€)**
Enniscorthy					
2020	116,113,881	6.42%	11.20%	4.00%	117,020,266
2021	**124,845,813**	**6.42%**	**11.20%**	**4.00%**	**125,820,359**
2027	**154,585,538**	**6.42%**	**11.20%**	**4.00%**	**155,792,233**
2031	175,980,019	6.42%	11.20%	4.00%	177,353,719
Gorey					
2020	134,040,405	1.92%	11.12%	4.00%	140,998,691
2021	**144,120,437**	**1.92%**	**11.12%**	**4.00%**	**151,601,996**
2027	**178,451,602**	**1.92%**	**11.12%**	**4.00%**	**187,715,355**
2031	203,149,122	1.92%	11.12%	4.00%	213,694,970
New Ross					
2020	87,252,365	4.33%	9.99%	4.00%	88,703,125
2021	**93,813,868**	**4.33%**	**9.99%**	**4.00%**	**95,373,728**
2027	**116,161,423**	**4.33%**	**9.99%**	**4.00%**	**118,092,859**
2031	132,238,046	4.33%	9.99%	4.00%	134,436,791
Wexford					
2020	221,177,115	1.56%	17.33%	4.00%	247,202,953
2021	**237,809,953**	**1.56%**	**17.33%**	**4.00%**	**265,792,972**
2027	**294,459,050**	**1.56%**	**17.33%**	**4.00%**	**329,107,951**
2031	335,211,883	1.56%	17.33%	4.00%	374,656,156
Wexford County*					
2020	558,583,765	2.17%	9.39%	4.00%	593,925,035
2021	**600,590,071**	**2.17%**	**9.39%**	**4.00%**	**638,589,056**
2027	**743,657,613**	**2.17%**	**9.39%**	**4.00%**	**790,708,398**
2031	846,579,070	2.17%	9.39%	4.00%	900,141,635

Table 5.7: Adjusted Total Available Expenditure - Comparison Non-Bulky Goods

Adjusted Total Available Expenditure - Comparison Non-Bulky Goods					
Year	**Total Available Expenditure (€)**	**Outflow (%)**	**Inflow (%)**	**Online Outflow (%)**	**Adjusted Total Available Expenditure (€)**
Enniscorthy					
2020	118,914,429	19.73%	9.34%	7.00%	98,243,066
2021	**127,856,965**	**19.73%**	**9.34%**	**7.00%**	**105,631,086**
2027	**158,313,982**	**19.73%**	**9.34%**	**7.00%**	**130,793,640**
2031	180,224,476	19.73%	9.34%	7.00%	148,895,346
Gorey					
2020	137,273,322	6.71%	9.75%	7.00%	131,832,041
2021	**147,596,474**	**6.71%**	**9.75%**	**7.00%**	**141,746,001**
2027	**182,755,671**	**6.71%**	**9.75%**	**7.00%**	**175,511,547**
2031	208,048,870	6.71%	9.75%	7.00%	199,802,167
New Ross					
2020	89,356,802	16.73%	8.45%	7.00%	75,701,712
2021	**96,076,562**	**16.73%**	**8.45%**	**7.00%**	**81,394,590**
2027	**118,963,117**	**16.73%**	**8.45%**	**7.00%**	**100,783,728**
2031	135,427,492	16.73%	8.45%	7.00%	114,732,093
Wexford					
2020	226,511,679	3.56%	36.10%	7.00%	284,369,652
2021	**243,545,684**	**3.56%**	**36.10%**	**7.00%**	**305,754,660**
2027	**301,561,100**	**3.56%**	**36.10%**	**7.00%**	**378,588,977**
2031	343,296,849	3.56%	36.10%	7.00%	430,985,306
Wexford County*					
2020	572,056,231	16.90%	8.45%	7.00%	590,146,470
2021	**615,075,686**	**16.90%**	**8.45%**	**7.00%**	**634,526,337**
2027	**761,593,870**	**16.90%**	**8.45%**	**7.00%**	**785,677,892**
2031	866,997,686	16.90%	8.45%	7.00%	894,414,912

Table 5.8: Adjusted Total Available Expenditure - Comparison Bulky Goods

Adjusted Total Available Expenditure - Comparison Bulky Goods					
Year	**Total Available Expenditure (€)**	**Outflow (%)**	**Inflow (%)**	**Online Outflow (%)**	**Adjusted Total Available Expenditure (€)**
Enniscorthy					
2020	29,728,607	18.36%	2.72%	10.00%	22,105,763
2021	**31,964,241**	**18.36%**	**2.72%**	**10.00%**	**23,768,148**
2027	**39,578,495**	**18.36%**	**2.72%**	**10.00%**	**29,429,998**
2031	45,056,119	18.36%	2.72%	10.00%	33,503,079
Gorey					
2020	34,318,330	5.40%	4.11%	10.00%	30,446,835
2021	**36,899,118**	**5.40%**	**4.11%**	**10.00%**	**32,736,481**
2027	**45,688,918**	**5.40%**	**4.11%**	**10.00%**	**40,534,691**
2031	52,012,217	5.40%	4.11%	10.00%	46,144,651
New Ross					
2020	22,339,200	12.53%	2.98%	10.00%	17,972,068
2021	**24,019,141**	**12.53%**	**2.98%**	**10.00%**	**19,323,593**
2027	**29,740,779**	**12.53%**	**2.98%**	**10.00%**	**23,926,698**
2031	33,856,873	12.53%	2.98%	10.00%	27,238,128
Wexford					
2020	56,627,920	5.31%	24.83%	10.00%	62,018,652
2021	**60,886,421**	**5.31%**	**24.83%**	**10.00%**	**66,682,544**
2027	**75,390,275**	**5.31%**	**24.83%**	**10.00%**	**82,567,101**
2031	85,824,212	5.31%	24.83%	10.00%	93,994,304
Wexford County*					
2020	143,014,058	15.40%	2.11%	10.00%	132,543,317
2021	**153,768,921**	**15.40%**	**2.11%**	**10.00%**	**142,510,766**
2027	**190,398,467**	**15.40%**	**2.11%**	**10.00%**	**176,458,488**
2031	216,749,422	15.40%	2.11%	10.00%	200,880,163

It is estimated that there will be a €337.2 million increase in adjusted available expenditure in the County over the period 2021 to 2027; or 23.8%. This reflects a period increase of €152.1 million in convenience available expenditure, €151.1 million in comparison non-bulky and €33.9 million in comparison bulky.

5.6 Existing Retail Floorspace

The existing retail floorspace within each catchment area has been set out in Table 5.9 below, following direct survey of retail units in each of the four main towns and their environs (see section 5.1). A gross to net ratio adjustment was not required as the net area was assessed as part of the survey. Table 5.9 does not take into consideration retail floorspace which had been permitted but not yet constructed (Section 5.13 reflects on this).

Table 5.9: Existing Retail Floorspace (Net)

Existing Retail Floorspace (Net)		
Retail Goods Types	**2020**	
	Net Floor Area	**Net Area as a % of Total Net Area**
Enniscorthy		
Convenience	6,749	41.1%
Comparison - Non-Bulky	6,514	39.7%
Comparison - Bulky	3,145	19.2%
Overall Total	**16,408**	**100.0%**
Gorey		
Convenience	16,143	44.7%
Comparison - Non-Bulky	10,491	29.1%
Comparison - Bulky	9,464	26.2%
Overall Total	**36,098**	**100.0%**
(continues overleaf)		

Retail Goods Types	Net Floor Area	Net Area as a % of Total Net Area
New Ross		
Convenience	7,263	23.3%
Comparison - Non-Bulky	10,700	34.3%
Comparison - Bulky	13,214	42.4%
Overall Total	**31,177**	**100.0%**
Wexford		
Convenience	16,648	27.8%
Comparison - Non-Bulky	31,331	52.3%
Comparison - Bulky	11,967	20.0%
Overall Total	**59,946**	**100.0%**
Wexford County		
Convenience	46,802	32.6%
Comparison - Non-Bulky	59,036	41.1%
Comparison - Bulky	37,789	26.3%
Overall Total	**143,627**	**100.0%**

At county level, the overall figures indicate that

- there has been a 13% or 5,371m2 increase in the quantum of convenience floorspace since 2011's assessed 41,431m2 (for the four towns).
- there has been a -4.9% or -3,064m2 decrease in the quantum of comparison non-bulky floorspace since 2011's assessed 62,100m2, and,
- there has been a -18.1% or 8,372m2 decrease in comparison bulky goods floorspace since 2011's assessed 46,161m2.

The proportion of retail stock dedicated to convenience goods sales in County Wexford was 32.6% (up from 27.7% in 2011), with comparison non-bulky goods at 41.1% (down slightly from 41.5% in 2011), and comparison bulky goods at 26.3% (down from 30.8% in 2011).

5.7 Indicative Existing Turnover

The indicative turnover per square metre of existing retail can be estimated by dividing adjusted available expenditure by the floorspace. The adjusted spend is therefore an estimate of what is currently being sustained by the floorspace in each catchment area. The indicative turnover is set out for each area in Table 5.10 overleaf.

For instance, at County level (aggregated from the sum of the four catchment areas), there was:

- 48,802m2 of convenience floorspace, which is estimated to be generating a turnover of €593.9 million in 2020,
- 59,036m2 of comparison non-bulky floorspace, which is estimated to be generating a turnover of €590.1 million in 2020, and,
- 37,789m2 of comparison bulky floorspace, which is estimated to be generating a turnover of €132.5 million in 2020.

These figures would indicate that trading conditions at County level are generally healthy. With the convenience sector operating with a turnover ratio of €13,284 per m2, comparison non-bulky trading at an average of €10,950 per m2, and comparison bulky trading at an average of €4,197 per m2.

In contrast to neighbouring counties, these ratios are quite high. Though it should be noted that the ratios quoted in neighbouring county strategies are from many years ago. Given the shifts in spend in recent years, these levels are not unsurprising.

Table 5.10: Existing Retail Floorspace and Indicative Retail Turnover

Existing Retail Floorspace and Indicative Retail Turnover				
Retail Goods Types	**2020**			
	Net Floor Area	**Net Area as a % of Total Net Area**	**Adjusted Total Available Expenditure (€)**	**Indicative Turnover Per M² (€)**
Enniscorthy				
Convenience	6,749	41.1%	€117,020,266	€17,338.90
Comparison - Non-Bulky	6,514	39.7%	€98,243,066	€15,081.83
Comparison - Bulky	3,145	19.2%	€22,105,763	€7,029.91
Overall Total	**16,408**	**100.0%**	**€237,369,095**	**-**
Gorey				
Convenience	16,143	44.7%	€140,998,691	€8,734.35
Comparison - Non-Bulky	10,491	29.1%	€131,832,041	€12,566.20
Comparison - Bulky	9,464	26.2%	€30,446,835	€3,217.27
Overall Total	**36,098**	**100.0%**	**€303,277,567**	**-**
New Ross				
Convenience	7,263	23.3%	€88,703,125	€12,213.30
Comparison - Non-Bulky	10,700	34.3%	€75,701,712	€7,075.17
Comparison - Bulky	13,214	42.4%	€17,972,068	€1,360.06
Overall Total	**31,177**	**100.0%**	**€182,376,904**	**-**
(continues overleaf)				

Retail Goods Types	Net Floor Area	Net Area as a % of Total Net Area	Adjusted Total Available Expenditure (€)	Indicative Turnover Per M^2 (€)
Wexford				
Convenience	16,648	27.8%	€247,202,953	€14,849.11
Comparison - Non-Bulky	31,331	52.3%	€284,369,652	€9,076.32
Comparison - Bulky	11,967	20.0%	€62,018,652	€5,182.50
Overall Total	**59,946**	**100.0%**	**€593,591,257**	**-**
Wexford County*				
Convenience	46,802	32.6%	€593,925,035	€12,690.03
Comparison - Non-Bulky	59,036	41.1%	€590,146,470	€9,996.46
Comparison - Bulky	37,789	26.3%	€132,543,317	€3,507.44
Overall Total	**143,627**	**100.0%**	**€1,316,614,822**	**-**

*County figures are informed by the aggregate sum of the catchments, as opposed to direct calculation

At catchment level, the figures are more variable.

- Enniscorthy

  Turnover per m2 in each retail type is far higher in Enniscorthy than the catchment average for the county. It is believed that this is due to a combination of factors resulting in the turnover ratios for convenience and comparison non-bulky particularly being far in excess of healthy levels, potentially indicating over-trading, but more likely an underassessment of retail floorspace in the catchment (for instance in Bunclody).

- Gorey

  Convenience turnover per m2 in Gorey is far short of the catchment average. Considering the scale of convenience floorspace in Gorey (comparable to Wexford Town), this indicates a significant level of under-trading and/or an underestimate of reckonable inflows. The catchment has approx. 60% of the population of the Wexford catchment, which is a contributory factor. Conversely, comparison non-bulky exceeds the county-catchment average and indicates healthy trading with potentially some slight over-trading. Comparison bulky falls short of the county-catchment average, but not significantly. It indicates a degree of under-trading or inefficiencies in floorspace utilisation.

- New Ross

  The catchment's convenience turnover ratio is fairly aligned with the county-catchment average, however there are clear signs of inefficient floorspace and under-trading as regards to comparison bulky goods.
- Wexford

  Convenience trading is very healthy in Wexford Town, with both comparison non-bulky and bulky mirroring this dynamic. This is largely due to the significant inflows from across the county, helping to increase the available spend as well as efficient floorspace utilisation by and large.

Each of these indicative turnover ratios mask significant variation in turnover for different types of retail (even within each specific category). In general, multiple branches of national or international multiples located within purpose-built shopping centres or other prime locations can distort the figures at low levels.

Prime town centre units will have substantially higher turnover per square metre than shops which are not situated in highly trafficked areas, or shops in older inefficient premises.

Retail operating in an independent capacity also have associated variations. In particular, it is likely that smaller units have substantially lower turnover per m2 than these indicative turnover ratios, whilst the largest supermarket operators have substantially higher turnover rates per m2 and are much more capable of trading at high volumes and low profits to control market share over sustainable long-term trading.

5.8 Representative Existing Turnover

In considering appropriate turnover levels for the calculation of the residual capacity it is important to have regard to the different nature of retail floorspace provided across the County. While data on turnover in Ireland is limited, particularly on a square meter basis, it follows that turnover will be higher for town centre retailing than for lower order areas. This is supported by the indication from the Household and Online surveys conducted which illustrate clear preferences towards inflow expenditure as a result of trade draw to larger centres. Additionally, as it is unlikely that the indicative turnovers are truly representative of existing trading (not all retail will operate as efficiently as other retail in its category, in its catchment), for the purposes of this assessment a series of representative turnover ratios are assumed instead.

Each catchment area has had its indicative turnover adjusted with respect to the county-catchment average, such that where it exceeds the average, it is maintained (though moderated slightly downward to account for inefficiencies), and where it is under the average, it is brought up to align with it. The representative county-catchment average turnover ratios are:

- €13,000 per m2 in convenience goods;
- €11,000 per m2 in comparison non-bulky goods; and,
- €4,000 per m2 in comparison bulky goods.

There are some exceptions to this rule, as noted in the overview of all adjustments below:

- Enniscorthy

  As convenience turnover per m2 in Enniscorthy is potentially an outlier, it has been adjusted *down* to the county-catchment average of €13,000 per m2. Its comparison ratios have been *moderated* to €15,000 and €7,000 for non-bulky and bulky respectively, as they exceed the average.
- Gorey

  As convenience turnover in Gorey is below the county-catchment average it has been adjusted *upwards* to €13,000 per m2. It’s comparison non-bulky has been *moderated* to €12,000 and its comparison bulky has been adjusted *upwards* to €4,000.

- New Ross
  All ratios in New Ross have been adjusted *upwards*, with convenience adjusting to €13,000, comparison non-bulky adjusting to €11,000 and comparison bulky to €4,000.
- Wexford
  Wexford convenience has been *moderated* to €14,500 per m2. Comparison non-bulky has been adjusted *upwards* to €11,000 and comparison bulky has been *moderated* to €5,000.

In all cases, the resulting turnover ratios reflect representative and healthy levels of trading for each catchment area. In this way, the residual capacity, which is calculated subsequently, will not be influenced by assumed increases in turnover efficiency, but will rather identify the systemic capacity for additional floorspace should the existing provision of floorspace be trading at healthy levels.

Table 5.11 below sets out the representative turnover per m2 in each catchment by retail type, as well as the resulting representative turnover in euros which would result; it is calculated by multiplying the existing floorspace set out in Table 5.9 by the representative turnover ratio estimates.

Table 5.11: Representative Turnover of Existing Retail Floorspace

Representative Turnover of Existing Retail Floorspace		
Retail Goods Types	2020	
	Representative Turnover Per M^2 (€)	Representative Turnover of Existing Retail (€)
Enniscorthy		
Convenience	13,000	€87,737,000
Comparison - Non-Bulky	15,000	€97,710,000
Comparison - Bulky	7,000	€22,011,721
Overall Total	**-**	**€207,458,721**
Retail Goods Types	**Representative Turnover Per M^2 (€)**	**Representative Turnover of Existing Retail (€)**
Gorey		
Convenience	13,000	€209,859,000
Comparison - Non-Bulky	12,500	€131,137,500
Comparison - Bulky	4,000	€37,854,196
Overall Total	**-**	**€378,850,696**
New Ross		
Convenience	13,000	€94,416,828
Comparison - Non-Bulky	11,000	€117,695,971
Comparison - Bulky	4,000	€52,856,804
Overall Total	**-**	**€264,969,602**
Wexford		

Convenience	14,500	€241,391,143
Comparison - Non-Bulky	11,000	€344,640,332
Comparison - Bulky	5,000	€59,834,650
Overall Total	**-**	**€645,866,124**
Wexford County*		
Convenience	13,284 indicative avg.	€633,403,970
Comparison - Non-Bulky	10,950 indicative avg.	€691,183,802
Comparison - Bulky	4,197 indicative avg.	€172,557,371
Overall Total	**-**	**€1,497,145,143**

5.9 Assumed Future Turnover

In order to calculate the requirements for additional retail floorspace within each of the catchment areas, the turnover per m2 of future retail floorspace requires setting out.

For the purposes of this assessment, the identified county-catchment averages have been used for future floorspace assessment – with no assumed change across the period. These are, €13,000 for convenience, €11,000 for comparison non-bulky and €4,000 for comparison bulky.

5.10 Residual Capacity

This section identifies the residual capacity potential which informs the subsequent minimum additional floorspace requirements over the lifetime of the retail strategy.

A residual surplus or shortfall is the difference between the adjusted available expenditure and the representative turnover total that can be generated from the existing floorspace.

- If the difference is positive, it is a surplus, denoting a capacity potential for new floorspace to capture the available spend.

- If the difference is negative, it is a shortfall, and denotes no potential for further floorspace until it returns to positive. This can indicate an over-supply or an unhealthy turnover ratio.

The residual surplus/shortfall for additional retail floorspace within each catchment area has been obtained by subtracting the turnover totals of existing convenience, comparison and bulky goods expenditure, as set out in Table 5.11, by the adjusted total available expenditure as set out in Tables 5.6-5.8. This is summarised (unadjusted by vacant floorspace) in Tables 5.12-5.14 below (showing each retail type).

In each table, where Wexford County figures are shown ("Wexford County *"), they reflect the aggregated sum of all catchment areas (they are not directly calculated).

Convenience Goods

It can be seen in Table 5.12 overleaf, showing residual capacity in convenience retailing, that Enniscorthy and Wexford are the only two catchment areas which exhibit an immediate residual capacity for additional floorspace (in 2020); with almost €29.3 million in residual surplus for Enniscorthy and €5.8 million in residual surplus for Wexford. This increases throughout the Plan period, in tandem with growth in available expenditure.

Both Gorey and New Ross have a residual shortfall in 2020, meaning there is no capacity for additional floorspace until adjusted available expenditure increases to match or exceed the turnover total potential of existing floorspace. This is sizable for Gorey, with a residual shortfall of over €68.8 million, whereas the residual shortfall in New Ross is €5.7 million – with it changing over to residual surplus during the Plan period (of just under €1 million in 2021 and €23.7 million by 2027). Overall the county is in surplus during the period.

The table also works through to show the resulting additional floorspace capacity (positive, where the residual shows a surplus), but this is reflected upon in section 5.11.

Table 5.12: Expenditure Available for New Retail – Convenience Goods (Residual Surplus and Floorspace Capacity)

Expenditure Available for New Retail (Residual Surplus and Floorspace Capacity)					
Convenience Goods					
Expenditure Residual				Floorspace Capacity	
Year	Adjusted Total Available Expenditure (€)	Turnover Total of Existing Floorspace (€)	Residual Surplus/Shortfall (€)	Turnover per sq. m of Future Retail Floorspace (€)	Additional Floorspace Reqs. (Cumulative, m2)
Enniscorthy					
2020	117,020,266	87,737,000	29,283,266	13,000	2,253
2021	**125,820,359**	**87,737,000**	**38,083,359**	**13,000**	**2,929**
2027	**155,792,233**	**87,737,000**	**68,055,233**	**13,000**	**5,235**
2031	177,353,719	87,737,000	89,616,719	13,000	6,894
Gorey					
2020	140,998,691	209,859,000	-68,860,309	13,000	-5,297
2021	**151,601,996**	**209,859,000**	**-58,257,004**	**13,000**	**-4,481**
2027	**187,715,355**	**209,859,000**	**-22,143,645**	**13,000**	**-1,703**
2031	213,694,970	209,859,000	3,835,970	13,000	295
New Ross					
2020	88,703,125	94,416,828	-5,713,703	13,000	-440
2021	**95,373,728**	**94,416,828**	**956,900**	**13,000**	**74**
2027	**118,092,859**	**94,416,828**	**23,676,031**	**13,000**	**1,821**
2031	134,436,791	94,416,828	40,019,963	13,000	3,078
Wexford					
2020	247,202,953	241,391,143	5,811,811	13,000	447
2021	**265,792,972**	**241,391,143**	**24,401,830**	**13,000**	**1,877**
2027	**329,107,951**	**241,391,143**	**87,716,808**	**13,000**	**6,747**
2031	374,656,156	241,391,143	133,265,014	13,000	10,251
Wexford County*					
2020	593,925,035	633,403,970	-39,478,935	13,000	-3,037
2021	**638,589,056**	**633,403,970**	**5,185,085**	**13,000**	**399**
2027	**790,708,398**	**633,403,970**	**157,304,428**	**13,000**	**12,100**
2031	900,141,635	633,403,970	266,737,665	13,000	20,518

Comparison Non-Bulky Goods

Table 5.13 overleaf sets out the residual capacity of comparison non-bulky retailing. Here, it is observed that Enniscorthy and Gorey are the only two catchment areas which exhibit an immediate residual capacity for additional convenience floorspace (in 2020). However, the residual surplus is relatively minor at €533,000 and €694,500 respectively. This increases throughout the Plan period, in tandem with growth in available expenditure; reaching €33.1 million and €44.4 million in 2027 respectively.

Both Wexford and New Ross have a residual shortfall in 2020, meaning there is no capacity for additional floorspace until adjusted available expenditure increases to match or exceed the turnover total potential of existing floorspace. This changes to residual surplus for Wexford in 2025, such that it will exhibit a residual surplus of €33.9 million by 2027. However, New Ross does not return to residual surplus during the period.

Overall the county starts in shortfall but ends in surplus across the period.

The table also works through to show the resulting additional floorspace capacity (positive, where the residual shows a surplus), but this is reflected upon in section 5.11.

Table 5.13: Expenditure Available for New Retail – Comparison Non-Bulky Goods (Residual Surplus and Floorspace Capacity)

Expenditure Available for New Retail (Residual Surplus and Floorspace Capacity)					
Comparison Non-Bulky Goods					
Expenditure Residual				**Floorspace Capacity**	
Year	**Adjusted Total Available Expenditure (€)**	**Turnover Total of Existing Floorspace (€)**	**Residual Surplus/Shortfall (€)**	**Turnover per sq. m of Future Retail Floorspace (€)**	**Additional Floorspace Reqs. (Cumulative, m2)**
Enniscorthy					
2020	98,243,066	97,710,000	533,066	11,000	48
2021	**105,631,086**	**97,710,000**	**7,921,086**	**11,000**	**720**
2027	**130,793,640**	**97,710,000**	**33,083,640**	**11,000**	**3,008**
2031	148,895,346	97,710,000	51,185,346	11,000	4,653
Gorey					
2020	131,832,041	131,137,500	694,541	11,000	63
2021	**141,746,001**	**131,137,500**	**10,608,501**	**11,000**	**964**
2027	**175,511,547**	**131,137,500**	**44,374,047**	**11,000**	**4,034**
2031	199,802,167	131,137,500	68,664,667	11,000	6,242
New Ross					
2020	75,701,712	117,695,971	-41,994,259	11,000	-3,818
2021	**81,394,590**	**117,695,971**	**-36,301,381**	**11,000**	**-3,300**
2027	**100,783,728**	**117,695,971**	**-16,912,243**	**11,000**	**-1,537**
2031	114,732,093	117,695,971	-2,963,877	11,000	-269
Wexford					
2020	284,369,652	344,640,332	-60,270,680	11,000	-5,479
2021	**305,754,660**	**344,640,332**	**-38,885,672**	**11,000**	**-3,535**
2027	**378,588,977**	**344,640,332**	**33,948,645**	**11,000**	**3,086**
2031	430,985,306	344,640,332	86,344,975	11,000	7,850
Wexford County*					
2020	590,146,470	691,183,802	-101,037,332	11,000	-9,185
2021	**634,526,337**	**691,183,802**	**-56,657,466**	**11,000**	**-5,151**
2027	**785,677,892**	**691,183,802**	**94,494,090**	**11,000**	**8,590**
2031	894,414,912	691,183,802	203,231,110	11,000	18,476

Comparison Bulky Goods

Table 5.14 overleaf sets out the residual capacity of comparison bulky retailing. Here, it is observed that Enniscorthy and Wexford are the only two catchment areas which exhibit an immediate residual capacity for additional convenience floorspace (in 2020). However, the residual surplus is relatively minor for Enniscorthy at €94,042, whereas it is €2.2 million in the Wexford catchment. Both increase throughout the Plan period, in tandem with growth in available expenditure; reaching €7.4 million and €22.7 million by 2027 respectively.

Both Gorey and New Ross have a residual shortfall in 2020, meaning there is no capacity for additional floorspace until adjusted available expenditure increases to match or exceed the turnover total potential of existing floorspace. This changes to residual surplus for Gorey in 2026, such that it will exhibit a residual surplus of €2.7 million by 2027. However, New Ross does not return to residual surplus during the period.

Overall the county starts in shortfall but ends in surplus across the period.

The table also works through to show the resulting additional floorspace capacity (positive, where the residual shows a surplus), but this is reflected upon in section 5.11.

Table 5.14: Expenditure Available for New Retail – Comparison Bulky Goods (Residual Surplus and Floorspace Capacity)

Expenditure Available for New Retail (Residual Surplus and Floorspace Capacity)					
Comparison Bulky Goods					
Expenditure Residual				Floorspace Capacity	
Year	Adjusted Total Available Expenditure (€)	Turnover Total of Existing Floorspace (€)	Residual Surplus/Shortfall (€)	Turnover per sq. m of Future Retail Floorspace (€)	Additional Floorspace Reqs. (Cumulative, m2)
Enniscorthy					
2020	22,105,763	22,011,721	94,042	4,000	24
2021	**23,768,148**	**22,011,721**	**1,756,428**	**4,000**	**439**
2027	**29,429,998**	**22,011,721**	**7,418,277**	**4,000**	**1,855**
2031	33,503,079	22,011,721	11,491,359	4,000	2,873
Gorey					
2020	30,446,835	37,854,196	-7,407,362	4,000	-1,852
2021	**32,736,481**	**37,854,196**	**-5,117,716**	**4,000**	**-1,279**
2027	**40,534,691**	**37,854,196**	**2,680,495**	**4,000**	**670**
2031	46,144,651	37,854,196	8,290,455	4,000	2,073
New Ross					
2020	17,972,068	52,856,804	-34,884,736	4,000	-8,721
2021	**19,323,593**	**52,856,804**	**-33,533,211**	**4,000**	**-8,383**
2027	**23,926,698**	**52,856,804**	**-28,930,106**	**4,000**	**-7,233**
2031	27,238,128	52,856,804	-25,618,675	4,000	-6,405
Wexford					
2020	62,018,652	59,834,650	2,184,002	4,000	546
2021	**66,682,544**	**59,834,650**	**6,847,894**	**4,000**	**1,712**
2027	**82,567,101**	**59,834,650**	**22,732,451**	**4,000**	**5,683**
2031	93,994,304	59,834,650	34,159,654	4,000	8,540
Wexford County*					
2020	132,543,317	172,557,371	-40,014,054	4,000	-10,004
2021	**142,510,766**	**172,557,371**	**-30,046,605**	**4,000**	**-7,512**
2027	**176,458,488**	**172,557,371**	**3,901,117**	**4,000**	**975**
2031	200,880,163	172,557,371	28,322,792	4,000	7,081

5.11 Future Retail Floorspace Potential - Unadjusted for Vacancy

Based on the application of the assumed future turnover ratios in section 5.9, the future floorspace capacity resulting from the assessed residual has been set out previously in Table 5.12-5.14. By dividing the residual by the assumed future ratio, the resulting future requirements in square meters can be determined.

A summary of these figures has been set out in Table 5.15 below.

It should be noted that the figures do not include “pipeline” floorspace, i.e. floorspace which has already been permitted but not constructed at the time of the preparation of the retail strategy. Nor do the figures have regard to the extent of vacant floorspace currently existing. The extent of unimplemented floorspace is discussed in section 5.14. The extent of vacant floorspace is explored in section 5.11 and 5.12 (in adjusting the floorspace potential).

Where Wexford County figures are shown (“Wexford County *”), they reflect the aggregated sum of all catchment areas (they are not directly calculated).

Table 5.15: Indicative Future Retail Floorspace Potential (Cumulative)

Indicative Future Retail Floorspace Potential (Cumulative)				
Retail Goods Type	**Floorspace Capacity (m2)**			
	2020	**2021**	**2027**	**2031**
Enniscorthy				
Convenience Goods	2,253	2,929	5,235	6,894
Comparison Goods (Non-Bulky)	48	720	3,008	4,653
Comparison Goods (Bulky)	24	439	1,855	2,873
Total Retail Floorspace Potential	**2,325**	**4,089**	**10,097**	**14,420**
(continues overleaf)				

Retail Goods Type	Floorspace Capacity (m2)			
	2020	2021	2027	2031
Gorey				
Convenience Goods	-5,297	-4,481	-1,703	295
Comparison Goods (Non-Bulky)	63	964	4,034	6,242
Comparison Goods (Bulky)	-1,852	-1,279	670	2,073
Total Retail Floorspace Potential	**-7,086**	**-4,796**	**3,001**	**8,610**
New Ross				
Convenience Goods	-440	74	1,821	3,078
Comparison Goods (Non-Bulky)	-3,818	-3,300	-1,537	-269
Comparison Goods (Bulky)	-8,721	-8,383	-7,233	-6,405
Total Retail Floorspace Potential	**-12,978**	**-11,610**	**-6,949**	**-3,596**
Wexford				
Convenience Goods	447	1,877	6,747	10,251
Comparison Goods (Non-Bulky)	-5,479	-3,535	3,086	7,850
Comparison Goods (Bulky)	546	1,712	5,683	8,540
Total Retail Floorspace Potential	**-4,486**	**54**	**15,517**	**26,641**
Wexford County*				
Convenience Goods	-3,037	399	12,100	20,518
Comparison Goods (Non-Bulky)	-9,185	-5,151	8,590	18,476
Comparison Goods (Bulky)	-10,004	-7,512	975	7,081
Total Retail Floorspace Potential	**-22,226**	**-12,263**	**21,666**	**46,075**

5.12 Vacant Floorspace

Overall 19,565m2 of vacant floorspace was identified during the 2019/2020 survey of buildings-use and retailing in each of the four towns. In considering this vacancy it is important to have regard to the fact that not all vacant floorspace will be occupied by retail floorspace. Some of this floorspace will be occupied by retail service and other uses. Town centres by their nature include a wide mix of retail and non-retail uses and this point needs to be considered when assessing the vacancy figures set out within this section.

An assumed 50% of the identified floorspace will be utilised by other commercial uses, leaving 50% to be allocated across an assumed distribution of convenience, comparison non-bulky and comparison bulky.

This assumed allocation has been informed by the composition of existing retail in each of the catchment areas. For instance, 29.1% of retail floorspace in the Gorey catchment area is committed comparison non-bulky retail. Assuming these same characteristic proportions might apply to the utilisation of 50% of the total vacant floorspace identified, Table 5.16 provides a breakdown of what this would equate to across each catchment area.

Table 5.16: Vacant Floorspace and Assumed Retail Allocation

Vacant Floorspace and Assumed Retail Allocation					
	Enniscorthy	**Gorey**	**New Ross**	**Wexford**	**Wexford County**
Vacant Floorspace	**Sq. M**				
Total Vacant Floorspace	2,510.18	2,353.66	5,423.94	9,277.80	**19,565.58**
Assumed "50%" Retail Use	**1,255.09**	**1,176.83**	**2,711.97**	**4,638.90**	**9,782.79**
Retail Goods % of All Retail	**%**				
Convenience	19.2%	26.2%	42.4%	20.0%	**26.3%**
Comparison - Non-Bulky	39.7%	29.1%	34.3%	52.3%	**41.1%**
Comparison - Bulky	41.1%	44.7%	23.3%	27.8%	**32.6%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

(continues from previous)					
	Enniscorthy	**Gorey**	**New Ross**	**Wexford**	**Wexford County**
Allocated Vacant Floorspace	**Sq. M**				
Convenience	240.54	308.52	1,149.47	926.06	**2,624.59**
Comparison - Non-Bulky	498.29	342.02	930.73	2,424.55	**4,195.59**
Comparison - Bulky	516.26	526.28	631.77	1,288.28	**2,962.60**
Total	**1,255.09**	**1,176.83**	**2,711.97**	**4,638.90**	**9,782.79**

When classified in this way, the assumed vacant floorspace can be factored against the identified future retail floorspace potential, to see by what amount, a reduced quantum of floorspace might be needed due to existing additional capacity.

Where possible additional retail floorspace will be targeted within existing vacant floorspace. For large scale retail applications, the onus will be on the applicant to demonstrate as part of the sequential test assessment that existing vacant units within the retail core are not suitable, viable and available to accommodate a development.

5.13 Future Retail Floorspace Potential - Adjusted for Vacancy

The quanta of identified future floorspace has been set out in Table 5.15. However, in considering the mitigating effect of existing vacant floorspace in each catchment area, these figures have been updated in Table 5.17 below.

It should be noted that while the figures now account for vacant floorspace, they do not include “pipeline supply”. The extent of unimplemented floorspace is discussed in section 5.14 and section 5.15 accounts for the impact of pipeline supply.

Where Wexford County figures are shown ("Wexford County *"), they reflect the aggregated sum of all catchment areas (they are not directly calculated).

Table 5.17: Indicative Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy

Indicative Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy				
Retail Goods Type	**Floorspace Capacity (m2)**			
	2020	**2021**	**2027**	**2031**
Enniscorthy				
Convenience Goods	2,012	2,689	4,994	6,653
Comparison Goods (Non-Bulky)	-450	222	2,509	4,155
Comparison Goods (Bulky)	-493	-77	1,338	2,357
Total Retail Floorspace Potential	**1,069**	**2,834**	**8,842**	**13,165**
Gorey				
Convenience Goods	-5,605	-4,790	-2,012	-13
Comparison Goods (Non-Bulky)	-279	622	3,692	5,900
Comparison Goods (Bulky)	-2,378	-1,806	144	1,546
Total Retail Floorspace Potential	**-8,262**	**-5,973**	**1,824**	**7,433**
New Ross				
Convenience Goods	-1,589	-1,076	672	1,929
Comparison Goods (Non-Bulky)	-4,748	-4,231	-2,468	-1,200
Comparison Goods (Bulky)	-9,353	-9,015	-7,864	-7,036
Total Retail Floorspace Potential	**-15,690**	**-14,322**	**-9,661**	**-6,308**
(continues overleaf)				

Wexford				
Convenience Goods	-479	951	5,821	9,325
Comparison Goods (Non-Bulky)	-7,904	-5,960	662	5,425
Comparison Goods (Bulky)	-742	424	4,395	7,252
Total Retail Floorspace Potential	**-9,125**	**-4,585**	**10,878**	**22,002**
Wexford County*				
Convenience Goods	-5,661	-2,226	9,476	17,894
Comparison Goods (Non-Bulky)	-13,381	-9,346	4,395	14,280
Comparison Goods (Bulky)	-12,966	-10,474	-1,987	4,118
Total Retail Floorspace Potential	**-32,008**	**-22,046**	**11,883**	**36,292**

The resulting figures indicate that County-wide:

- There is no additional capacity for convenience floorspace by 2021. Approximately 9,476m2 of identified capacity arises by 2027, increasing to 17,894m2 by 2031 if left unaddressed.
- There is no additional capacity for comparison non-bulky floorspace by 2021. Approximately 4,395m2 of identified capacity arises by 2027, increasing to 14,280m2 by 2031 if left unaddressed.
- There is no additional capacity for comparison bulky floorspace by 2027. Approximately 4,118m2 of identified capacity arises by 2031.

Each catchment's requirements vary accordingly, with the Enniscorthy Catchment Area:

- Having additional capacity for convenience floorspace in 2020 of 2,012m2, increasing to 4,994m2 by 2027 and 6,653m2 by 2031, if left unaddressed.
- Having no additional capacity for comparison non-bulky floorspace in 2020. Approximately 222m2 of identified capacity arises by 2021, increasing to 2,509m2 by 2027 and 4,155m2 in 2031, if left unaddressed.

- Having no additional capacity for comparison bulky floorspace in 2021. Approximately 1,338m2 of identified capacity arises by 2027, increasing to 2,357m2 by 2031, if left unaddressed.

In the <u>Gorey Catchment Area</u>:

- There is no additional capacity for convenience floorspace throughout the Plan period, including up to 2031.
- There is no additional capacity for comparison non-bulky floorspace in 2020. Approximately 622m2 of identified capacity arises by 2021, increasing to 3,692m2 by 2027 and 5,900m2 in 2031, if left unaddressed.
- There is no additional capacity for comparison bulky floorspace to 2021. Approximately 144m2 of identified capacity arises by 2027, increasing to 1,546m2 by 2031, if left unaddressed.

In the <u>New Ross Catchment Area</u>:

- There is no additional capacity for convenience floorspace to 2021. Approximately 672m2 of identified capacity arises by 2027, increasing to 1,929m2 by 2031, if left unaddressed.
- There is no additional capacity for comparison non-bulky floorspace throughout the Plan period, including up to 2031.
- There is no additional capacity for comparison bulky floorspace throughout the Plan period, including up to 2031.

In the <u>Wexford Catchment Area</u>:

- There is no additional capacity for convenience floorspace in 2020. Approximately 951m2 of identified capacity arises by 2021, increasing to 5,821m2 by 2027 and 9,325m2 in 2031, if left unaddressed.
- There is no additional capacity for comparison non-bulky floorspace in 2021. Approximately 662m2 of identified capacity arises by 2027, increasing to 5,425m2 by 2031, if left unaddressed.

- There is no additional capacity for comparison bulky floorspace in 2020. Approximately 424m2 of identified capacity arises by 2021, increasing to 4,395m2 by 2027 and 7,252m2 by 2031, if left unaddressed.

5.14 Future Pipeline Supply

The figures set out in section 5.13 do not include for "pipeline supply", i.e. extant planning permissions which have been permitted but not completed at the time of the preparation of the Retail Strategy. An exercise was undertaken to identify and review planning applications which had been granted and were still within their permitted period of duration (with or without activity, as indicated by any commencement notices associated). The extent of this unimplemented floorspace is summarised below. A cut-off point of June 2020 was used when undertaking this review of consents and the figures classified by those application which were not yet commenced (Table 5.18), and those applications which have been commenced, but have not yet completed (Table 5.19).

Table 5.18: Total floorspace for Granted but NOT Commenced Retail Planning Applications

Total floorspace for Granted but NOT Commenced Retail Planning Applications					
	Enniscorthy	**Gorey**	**New Ross**	**Wexford**	**Wexford County**
Granted Floorspace	**M2**				
	338	4063.75	221.4	1082.3	**5,705.5**
	Breakdown by Retail type				
Comparison - Non-Bulky			23	28.3	**51.3**
Comparison-Bulky				371	**371.0**
Convenience		190	22	638	**850.0**
Generic Retail	338	3873.75	176.4	45	**4,433.2**

Table 5.19: Total floorspace for Commenced but Not Completed Retail Planning Applications

Total floorspace for Commenced but Not Completed Retail Planning Applications					
	Enniscorthy	**Gorey**	**New Ross**	**Wexford**	**Wexford County**
Commenced Floorspace	**M2**				
	64.2	423.6	357	144.6	**989.4**
	Breakdown by Retail type				
Comparison - Non-Bulky	64.2				**64.2**
Comparison-Bulky			357		**357.0**
Convenience		94.6			**94.6**
Generic Retail		329		144.6	**473.6**

Wexford County

As of the June 2020 there are 23 granted commercial planning applications pertaining to retail use across Wexford county. Of these applications 5 are currently in the commencement stages, while 18 are granted but still not commenced. These applications equate to a total of 6,695 m2 of additional retail floorspace. Table 5.18 shows that of the 6,695 m2 of granted floorspace 5,705 m2 are yet to commence, while

Table 5.19 shows that only 989 m2 has commenced.

A further breakdown of this floorspace into retail types can be seen in each table (5.18 and 5.19). Applications whose description did not specify a type have been categorised as "Generic Retail".

Enniscorthy

There is a total of 402m2 of granted retail floorspace in this catchment area, across 2 applications. The majority of this is classified as “Generic Retail”, which equates to 338m2 of the total granted floorspace. Of the total granted floorspace 64.2m2 has commenced, this commenced floorspace is associated with the “Comparison – Non-Bulky” retail type. Enniscorthy has the lowest total granted floorspace of all the catchment areas.

Gorey

There is a total of 4,487m2 of granted retail floorspace in this catchment area, across 9 applications. The majority of this is classified as “Generic Retail”, which is responsible for 4,203m2 of the total floorspace. Only 424m2 of the total granted floorspace has commenced, this commenced floorspace is associated with both “Generic retail” and “Convenience” retail types, with 329m2 and 95m2 respectively. Gorey has the highest total granted floorspace of all the catchment areas.

New Ross

There is a total of 578m2 of granted retail floorspace in this catchment area, across 5 applications. The majority of the floorspace is classified as “Comparison - Bulky”, which is responsible for 357m2 of the total floorspace. 357m2 of the total granted floorspace has commenced, this floorspace is associated with the “Comparison –Bulky” retail type. New Ross has second lowest total granted floorspace of all the catchment areas.

Wexford

There is a total of 1,227m2 of granted retail floorspace in this catchment area, across 7 applications. The majority of this is classified as “Convenience” retail. Only 145m2 of the total granted floorspace has commenced, this floorspace is associated with the “Generic retail” retail type. Wexford has the second highest total granted floorspace of all the catchment areas.

5.15 Future Retail Floorspace Potential - Adjusted for Vacancy & Pipeline Supply

Whereas identified vacant floorspace presents the most likely mitigant to future requirements, pipeline supply may also be considered, albeit, with less certainty, as it is subject to a myriad of delivery factors which may delay or prevent it from being fully realised within the lifetime of the Retail Strategy.

A number of these permitted schemes are significant and if delivered would have an impact on the identified requirements set out in section 5.11 (for unadjusted requirements) and section 5.13 (for requirements adjusted by vacancy). In some cases, this would increase the identified residual surplus of floorspace such that no further floorspace is necessary, in others, it would reduce requirements accordingly.

In exploring the impact of the pipeline supply, an assumed 50% delivery rate of extant permissions has been taken, and the requirements, adjusted for vacancy, have been further adjusted below with this 50% in mind. Extant permissions classified as 'Generic Retail' (where the specific retail type was not specified) have been distributed across the retail types using the 2016 composition of retail floorspace in each Town. Table 5.20 below sets out the additive floorspace in this regard.

Table 5.20: Assumed 50% of Extant Permissions with 'Generic Retail' distributed

Extant Permissions - Assumed 50% Delivery Rate and Distribution of 'Generic Retail'					
	Enniscorthy	**Gorey**	**New Ross**	**Wexford**	**Wexford County**
Distributed Extant Permissions	**Sq. M**				
Convenience	32.4	693.2	48.4	337.9	**1,111.9**
Comparison - Non-Bulky	99.2	610.7	41.8	63.7	**815.4**
Comparison - Bulky	69.5	939.7	199.0	211.8	**1,420.1**
Total	**201.1**	**2,243.7**	**289.2**	**613.5**	**3,347.4**

The quanta of identified future floorspace, adjusted for vacancy, as set out in Table 5.17 has been adapted to incorporate the mitigating effect of the assumed 50% delivery of extant permissions in each catchment area, these adjusted figures have been set out in Table 5.21 below. **Where Wexford County figures are shown ("Wexford County *"), they reflect the aggregated sum of all catchment areas (they are not directly calculated).**

Table 5.21: Indicative Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy and Assumed 50% of Pipeline Supply

Indicative Future Retail Floorspace Potential (Cumulative) - Adjusted for Vacancy and Extant Permissions (assumed 50% of floorspace)				
Retail Goods Type	**Floorspace Capacity (m2)**			
	2020	**2021**	**2027**	**2031**
Enniscorthy				
Convenience Goods	1,980	2,657	4,962	6,621
Comparison Goods (Non-Bulky)	-549	123	2,410	4,056
Comparison Goods (Bulky)	-562	-147	1,269	2,287
Total Retail Floorspace Potential	**868**	**2,633**	**8,641**	**12,963**
Gorey				
Convenience Goods	-6,299	-5,483	-2,705	-707
Comparison Goods (Non-Bulky)	-890	12	3,081	5,290
Comparison Goods (Bulky)	-3,318	-2,745	-796	607
Total Retail Floorspace Potential	**-10,506**	**-8,217**	**-420**	**5,189**
New Ross				
Convenience Goods	-1,637	-1,124	623	1,881
Comparison Goods (Non-Bulky)	-4,790	-4,273	-2,510	-1,242

Comparison Goods (Bulky)	-9,552	-9,214	-8,063	-7,235
Total Retail Floorspace Potential	**-15,980**	**-14,611**	**-9,950**	**-6,597**
(Continues overleaf) **Wexford**				
Convenience Goods	-817	613	5,483	8,987
Comparison Goods (Non-Bulky)	-7,967	-6,023	598	5,361
Comparison Goods (Bulky)	-954	212	4,183	7,040
Total Retail Floorspace Potential	**-9,738**	**-5,198**	**10,264**	**21,388**
Wexford County*				
Convenience Goods	-6,773	-3,338	8,364	16,782
Comparison Goods (Non-Bulky)	-14,196	-10,162	3,579	13,465
Comparison Goods (Bulky)	-14,386	-11,894	-3,407	2,698
Total Retail Floorspace Potential	**-35,356**	**-25,394**	**8,536**	**32,944**

The resulting figures indicate that County-wide:

- There is no additional capacity for convenience floorspace by 2021. Approximately 8,364m2 of identified capacity arises by 2027, increasing to 16,782m2 by 2031 if left unaddressed.
- There is no additional capacity for comparison non-bulky floorspace by 2021. Approximately 3,579m2 of identified capacity arises by 2027, increasing to 13,465m2 by 2031 if left unaddressed.
- There is no additional capacity for comparison bulky floorspace by 2027. Approximately 2,698m2 of identified capacity arises by 2031.

Each catchment's requirements vary accordingly, with the Enniscorthy Catchment Area:

- Having additional capacity for convenience floorspace in 2020 of 1,980m2, increasing to 4,962m2 by 2027 and 6,621m2 by 2031, if left unaddressed.
- Having no additional capacity for comparison non-bulky floorspace in 2020. Approximately 123m2 of identified capacity arises by 2021, increasing to 2,410m2 by 2027 and 4,056m2 in 2031, if left unaddressed.
- Having no additional capacity for comparison bulky floorspace in 2021. Approximately 1,269m2 of identified capacity arises by 2027, increasing to 2,287m2 by 2031, if left unaddressed.

In the Gorey Catchment Area:

- There is no additional capacity for convenience floorspace throughout the Plan period, including up to 2031.
- There is no additional capacity for comparison non-bulky floorspace in 2020. Approximately 12m2 of identified capacity arises by 2021, increasing to 3,081m2 by 2027 and 5,290m2 in 2031, if left unaddressed.
- There is no additional capacity for comparison bulky floorspace to 2027. Approximately 607m2 arises by 2031.

In the New Ross Catchment Area:

- There is no additional capacity for convenience floorspace to 2021. Approximately 623m2 of identified capacity arises by 2027, increasing to 1,881m2 by 2031, if left unaddressed.
- There is no additional capacity for comparison non-bulky floorspace throughout the Plan period, including up to 2031.
- There is no additional capacity for comparison bulky floorspace throughout the Plan period, including up to 2031.

In the Wexford Catchment Area:

- There is no additional capacity for convenience floorspace in 2020. Approximately 613m2 of identified capacity arises by 2021, increasing to 5,483m2 by 2027 and 8,987m2 in 2031, if left unaddressed.
- There is no additional capacity for comparison non-bulky floorspace in 2021. Approximately 598m2 of identified capacity arises by 2027, increasing to 5,361m2 by 2031, if left unaddressed.
- There is no additional capacity for comparison bulky floorspace in 2020. Approximately 212m2 of identified capacity arises by 2021, increasing to 4,183m2 by 2027 and 7,040m2 by 2031, if left unaddressed

6.0 Retail Planning Policies and Criteria for Assessment

This chapter draws upon the qualitative and quantitative analysis of the preceding chapters and provides policy direction and guidance to be used to guide retail development and improve retail conditions in the County.

The Retail Hierarchy informs the direction of retail scale and type in the county. The Core Retail Areas for each of the four main towns within the Retail Hierarchy are mapped, Opportunity Sites are identified and specific planning objectives for each of the towns are outlined. Thereafter, the retail planning objectives of the Wexford County Development Plan 2021-2027 are set out along with the criteria for the assessment of future retail development in the County.

6.1 Retail Hierarchy

As outlined in Section 1.7, the purpose of the Retail Hierarchy is to indicate the level and form of retailing activity appropriate to the various urban centres of the county to enable the Council to protect each centre's overall vitality and viability whilst allowing each centre to perform its overall function within the county's settlement hierarchy. The County Wexford Retail Hierarchy 2021-2027 is set out again in Table 6.1 below:

Table 6.1: Retail Settlement Hierarchy

Retail Planning Guidelines Settlement Type	Wexford Core Strategy Hierarchy	Retail Settlements	Appropriate Scale and Type of Retail
Level 1: Regional Town	Key Town	Wexford Town	Major Convenience and Comparison
Level 2: Large Sub-Regional Towns	Key Town	Gorey Town	Large to Medium scale convenience and medium scale comparison
Level 2: Large Sub-Regional Towns	Large Town	Enniscorthy Town / New Ross Town	Large to Medium scale convenience and medium scale comparison
(continues overleaf)			

Level 3: Small Service Towns	Service Settlements	Bunclody, Castlebridge, Courtown and Riverchapel, Ferns, Rosslare Harbour and Kilrane, Rosslare Strand	Medium scale convenience along with small to medium scale comparison including tourism related comparison
	Strategic Settlements	Bridgetown, Campile, Clonroche, Coolgreany, Kilmuckridge, Kilmore Quay, Taghmon and Wellingtonbridge	Medium scale convenience along with small to medium scale comparison including tourism related comparison
Level 4: Local Shopping or Neighbourhood Centres	Various Villages and Rural Settlements		Predominantly lower order convenience, but not excluding tourism related comparison

6.2 Core Retail Areas, Opportunity Sites and Objectives

The Retail Planning Guidelines (2012) define retail areas as “that part of a town centre which is primarily devoted to shopping”. For the purposes of this Strategy and consistent with the Council’s approach to the Wexford Retail Strategy 2013-2019, such areas are defined as ‘Core Retail Areas’. Core retail areas contain the primary retail streets of a centre where the main concentration of retail activity takes places. New retail development will be preferred and encouraged within the core retail areas, with an emphasis on the primary retail streets in particular to be retained as the key locations for retail development. In accordance with the Retail Planning Guidelines (2012) it is also necessary to identify ‘Opportunity Sites’ which are considered appropriate for future retail development within or adjacent to the core of the four main towns. The identification of appropriate opportunity sites will further enhance and maintain the vitality and viability of the main retail centres of the county should applications for retail development materialise in the future. It is important to note that the identification of an Opportunity Site does not indicate that retail development is permitted in principle on these sites, they will still be subject to compliance with the criteria for assessing future retail development outlined in section 6.3.2. Furthermore, these sites should be examined and addressed in a sequential approach before any site further from the retail core is proposed for consideration. In keeping with the sequential approach, a focus on encouraging retail occupancy of vacant premises located within the retail core should be prioritised in the first instance.

6.2.1 Wexford Town

The Core Retail Areas, Town Centre sites, Opportunity Sites and the retail offer organised by retail type – Convenience, Comparison and Bulky are set out in Figure 6.1.

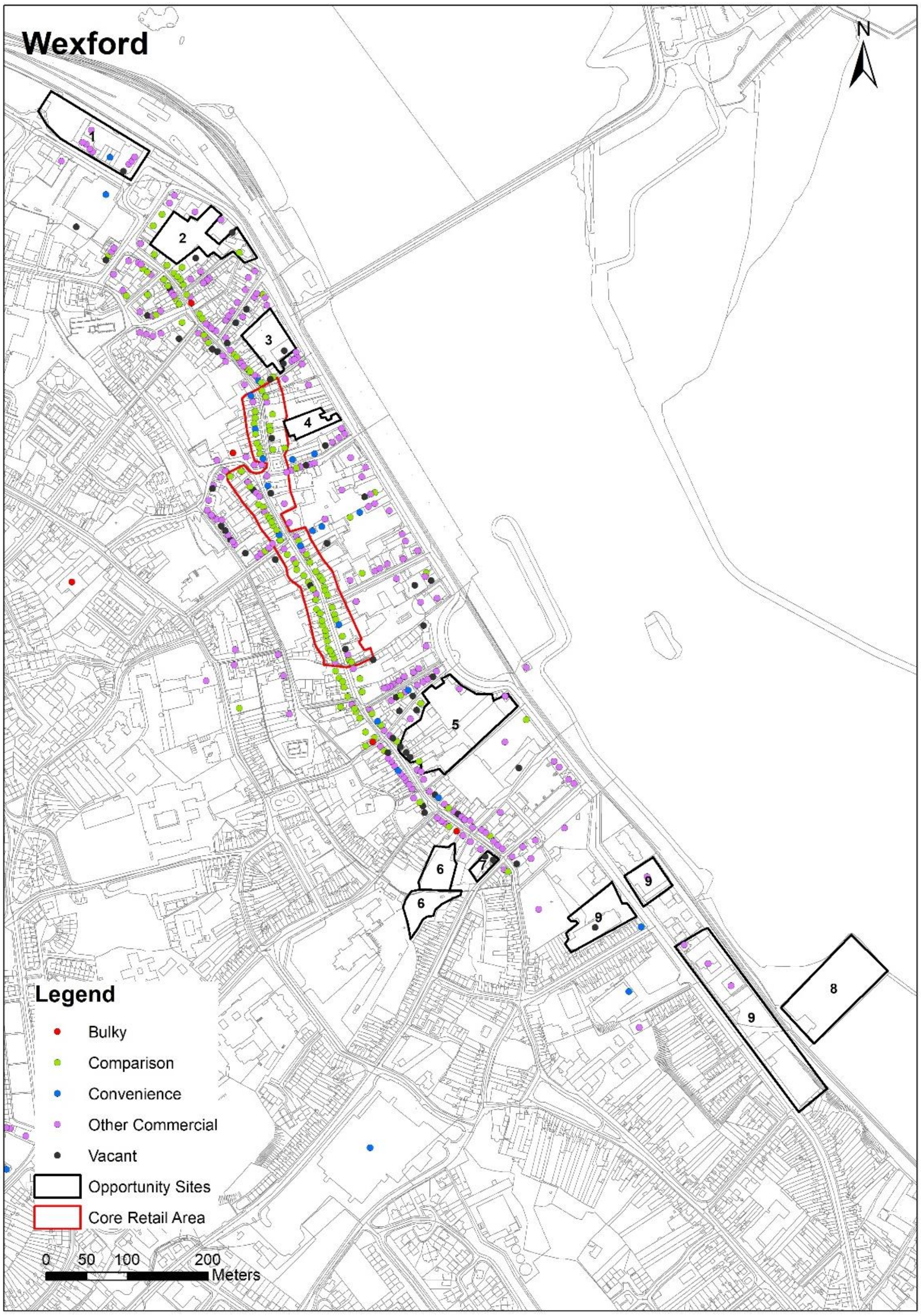


Figure 6.1 Wexford Town – Retail Offer, Core Retail Areas and Opportunity Sites

Occupying, adapting and/or redeveloping vacant and derelict premises within the core retail area is the preferred and optimal solution for accommodating future retail development in Wexford Town. Vacant units and other opportunity sites that could potentially be redeveloped for retail purposes are available at the following town centre locations:

1. Redmond Road/Square - Cinema private car park site and retail complex; – this prominent site is considered a prime site with riverside amenity, located on the arterial R730 road into Wexford Town and Redmond Square. It is proximate to the train station and bus stops
2. Sam McCauley Car park accessed from and extending onto Quays
3. Commercial Quay Car park; highly visible site with frontage onto Commercial Quay opposite the bridge at gateway location to the town, forming a terminal vista on approach from Wexford Bridge
4. Private Car park accessed off the Quay and with pedestrian access to Bullring Market and Common Quay Street (former F.O'Connor & Co site)
5. Lowney’s Mall and former Tesco site and car park extending from Main Street through to Crescent Quay. This site is considered a prime site located on South Main Street. It is currently vacant and thus provides an immediate opportunity to serve a retail function on the primary retail street within the town.
6. Public Car Park South Main Street behind Sky in the Ground Pub (entered from public carpark off Bride Street and exited onto South Main Street) and Rope Walk Private Car park accessed off King Street Upper
7. Vacant units as South Main Street reaches Barrack Street and King Street
8. Trinity Wharf; Prime regeneration site for Wexford Town with prominent position and potential for retail to integrate with mixed use redevelopment and services.
9. Trinity Street sites – attractive quay side location with potential to integrate with Trinity Wharf regeneration

Town Specific policies for Wexford Town are included in section 6.3.2.

6.2.2 Enniscorthy

The Core Retail Areas, Town Centre sites, Opportunity Sites and the retail offer organised by retail type – Convenience, Comparison and Bulky are set out in Figure 6.2. Within this area there are 4 sites.

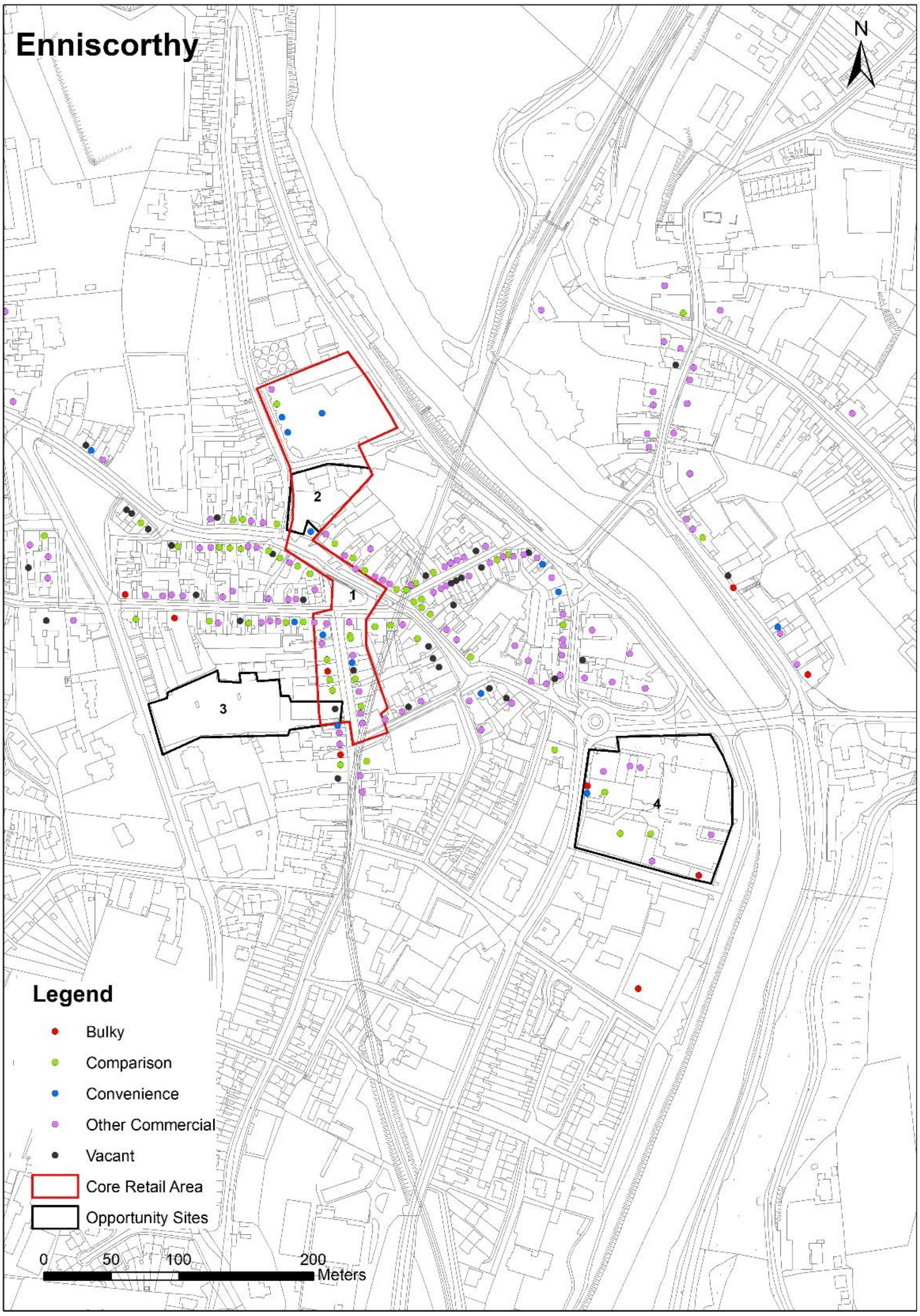


Figure 6.2 Enniscorthy – Retail Offer, Core Retail Areas and Opportunity Sites

The level of vacancy throughout Enniscorthy town centre and within the core retail area presents a variety of opportunities to reuse existing sites and develop new sites for retail development, as set out below and on the accompanying map:

1. All existing vacant sites or sites which may become vacant in the future on the primary retail streets of Rafter Street, Wafer Street, Main Street, Market Square, Irish Street and Slaney Street or those other streets within the core retail area as identified in Figure 6.2 above. Given the nature of the retail sector, the occupation and vacancy of retail units is constantly evolving and as such opportunities to reuse units within these areas shall be prioritised. The traditional core of Enniscorthy offers an attractive and accessible street scape where retail customers can be offered dynamic services and attractions.
2. Site at Main Street/Irish Street corner and extending down to Barrack Street (part of former Murphy Floods Hotel site).
3. Part of former Dunnes unit on Rafter Street and car park behind.
4. Abbey Square site (whole block with car park and all units except Bank of Ireland).

Town specific policies for Enniscorthy are included in section 6.3.3.

6.2.3 Gorey

The core retail area of Gorey is outlined in Figure 6.3 below. Within this town centre eight opportunity sites have been identified as being suitable for retail development.

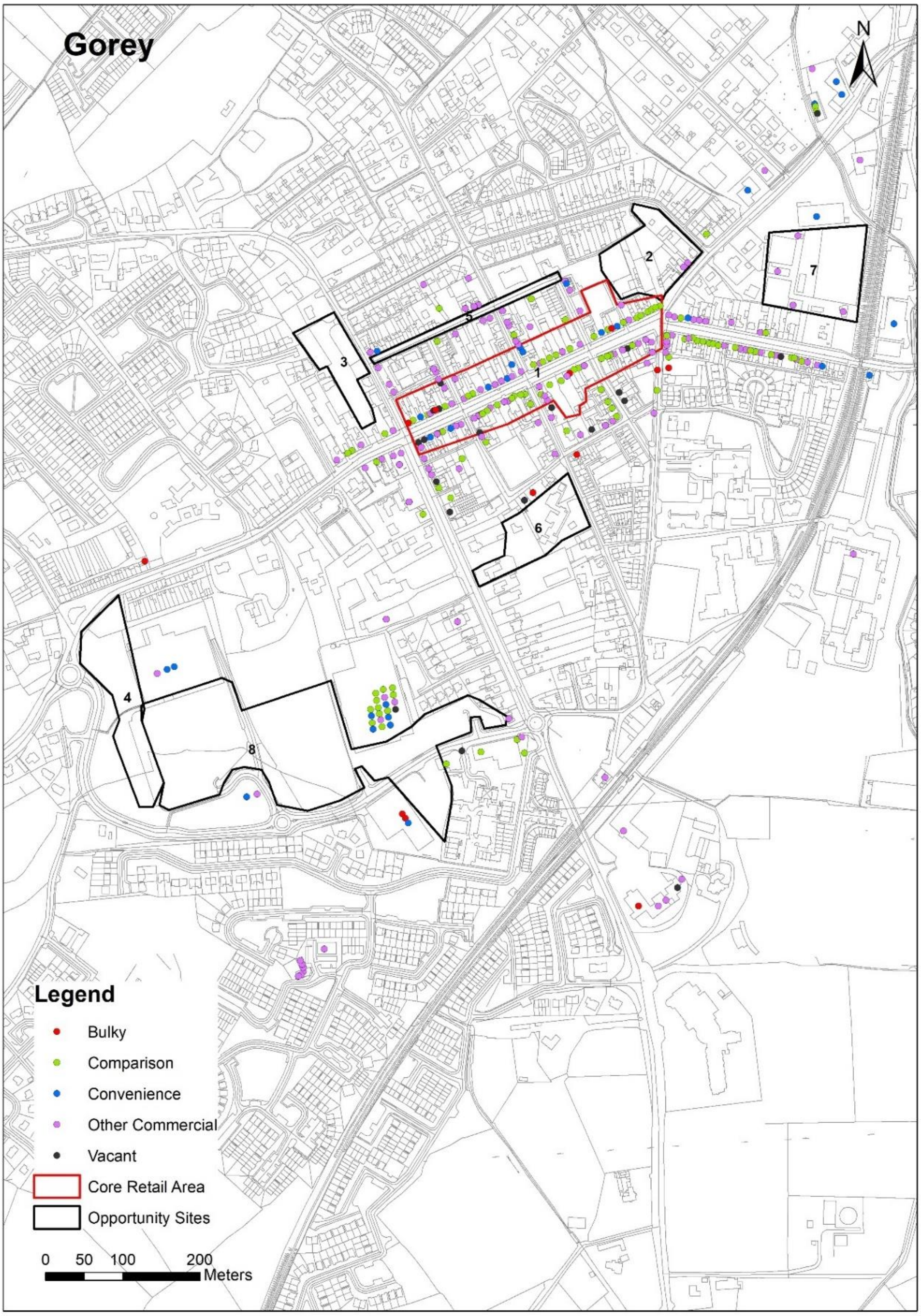


Figure 6.3: Gorey Town – Retail Offer, Core Retail Areas and Opportunity Sites

Occupying, adapting and/or redeveloping vacant and derelict premises within the core retail area is the preferred and optimal solution for accommodating future retail development in Gorey as noted in paragraph 1 below, however other opportunities also exist for larger scale retail development in close proximity to these areas:

1. All existing vacant sites or sites which may become vacant in the future on the primary retail street of Main Street, as identified in Figure 6.3 above. Given the nature of the retail sector, the occupation and vacancy of retail units is constantly evolving and as such opportunities to reuse units within the core retail area shall be prioritised.
2. Arklow Row site (former Heiton Buckley site and potentially adjacent sites) - Situated at an edge of centre location but directly adjacent to the core retail area, a comprehensive redevelopment of this site would require land assembly as land parcels are likely under different ownerships in commercial and residential uses at present. It does however provide a prime opportunity for a large-scale retail development in close proximity to the town centre. Alternatively, smaller parcels of the site may be suitable to come forward for retail development in isolation.
3. Site on North Parade – Unused storage site with barn style buildings provides an opportunity for a medium scale retail redevelopment in close proximity to the core retail area.
4. Land adjacent to Tesco – Occupying an edge of centre location and adjoining McCurtain Street and Paul Funge Boulevard, this site is anchored by Gorey Shopping Centre and Tesco. The site further benefits from planning permission through an An Bord Pleanála decision for a mixed-use scheme including retail, commercial and residential uses.
5. Pearse Street backlands – infill opportunity close to existing core retail area.
6. Site of the old St. Josephs CBS and associated backlands – adjacent to the core retail area.
7. Site on Esmond Street (Car park and property to front) – proximity to existing retail, large site and adjacent to primary access routes.
8. Land between Tesco and Dunnes and car parking sites serving Tesco and Gorey Shopping Centre.

Town Specific policies for Gorey Town are included in section 6.3.4.

6.2.4 New Ross

The Core Retail Areas, Town Centre sites, Opportunity Sites and the retail offer organised by retail type – Convenience, Comparison and Bulky are set out in Figure 6.4 below. Within the town, 10 opportunity sites have been identified as being suitable for retail development.

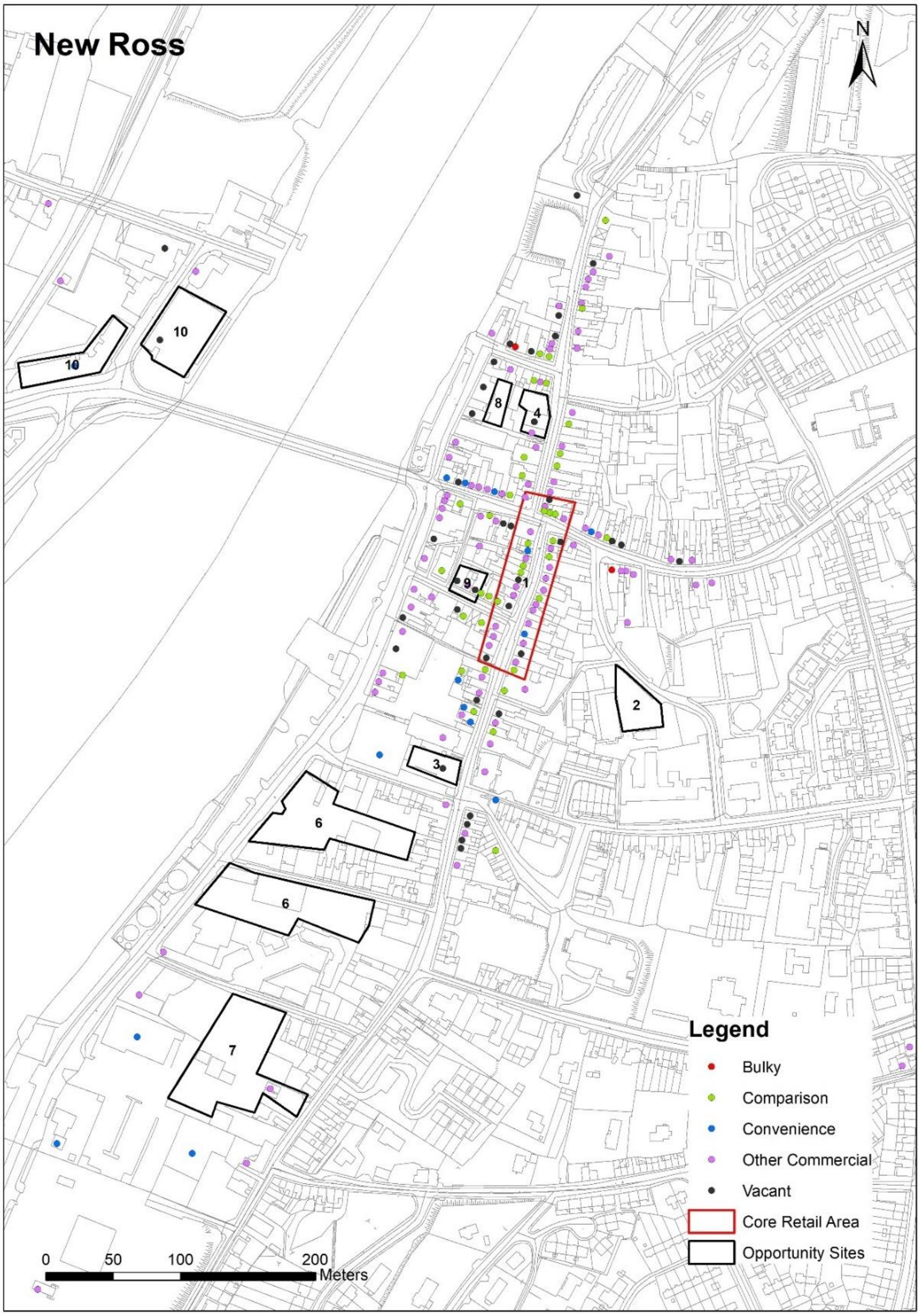


Figure 6.4: New Ross Town – Retail Offer, Core Retail Areas and Opportunity Sites

The level of vacancy throughout New Ross town centre and within the retail core presents a variety of opportunities to reuse existing sites. Several large edge of centre sites outside of the core retail area exist. The prime vacant sites are identified below in number 2 and 3. These are within close proximity to the town centre and could support sites for new retail development:

1. All existing vacant sites or sites which may become vacant in the future on the main shopping streets of North Street and South Street or those other streets within the core retail area as identified in Figure 6.4 above. Given the nature of the retail sector, the occupation and vacancy of retail units is constantly evolving and as such opportunities to reuse units within these areas shall be prioritised.
2. Barrack Lane Carpark. Located to the rear of the Main Street, this elevated site provides potential for expansion of the core retail area, providing direct pedestrian linkage and places of interest to grow and enhance the street existing linear street network. It would also provide passive surveillance to Barrack Lane and the Library Park.
3. Former Ritz Cinema Site - Located on South Street the characteristics of this site provide an opportunity of either the reuse of the existing building or for a medium scale retail redevelopment though the utilisation of the rear of the site which adjoins Sugar House Lane.
4. Former Eurobuster Store Site - Located on North Street this site is currently vacant and thus provides an immediate opportunity to serve a retail function.
5. Car Park Site #1 on the Quay – Located on the Quay directly opposite the Dunbrody Ship and Visitor Centre this car park site offers the opportunity to support a new large-scale retail development at an edge of centre location.
6. Car Park Site #2 on the Quay (Billy Foley's Yard and the former Campus Garage) – Located on the Quay and bound to the north by Marsh Lane, this site presents an opportunity for a large-scale retail redevelopment at an edge of centre location. It has previously benefitted from a planning permission a mixed-use development including retail use.

7. Former Old Malthouse and associated lands – This site is accessed via Priory Street, and to the west by Lidl. This site has previously benefitted from a planning permission a mixed-use development including retail use.
8. Kennedy Plaza, infill site with potential for attractive courtyard retail offer in sheltered location amongst heritage warehouse buildings.
9. Charles Street site; adjacent to the post office and pedestrian laneway, this small site has significant potential to enhance heritage setting with imaginative reuse. The site has potential benefit from location on pedestrian network with footfall potential.
10. The Moorings and Waterside blocks at Rosbercon have capacity at ground floor level to accommodate additional retail and supporting services.

Town specific policies for New Ross are included in section 6.3.5.

6.3 Retail Planning Objectives

6.3.1 Wexford County

In order to shape and guide retailing in the County over the period of the Development Plan 2021-2027, a number of retail objectives have been developed. In formulating and adhering to these objectives, Wexford County Council will look to ensure that the development of all future retail floorspace is carried out in accordance with the requirements of the Retail Planning Guidelines. In addition, these objectives can be seen to form a single integrated and coherent strategic policy framework which will ensure that all development within the County is carried out in keeping with the ideals of sustainable development.

The objectives outlined below have built on those of the preceding Retail Strategy and have been created with the aim of supporting the expansion of the retail offering of County Wexford in a sustainable manner. They have been formulated to:

I. Ensure that County Wexford possesses a clear policy framework that will inform both the conception and assessment of retail development proposals and help to guarantee that the strategic and local convenience and comparison retailing needs of the County are met;

II. Maintain, and where possible, enhance the existing competitiveness of the County's main towns by facilitating the development of additional retail floorspace where it can be clearly established that such development will result in tangible improvements to the retail offering of the County;

III. Acknowledge the importance of the four main towns in providing a wide range of both convenience and comparison shopping in locations close to centres of population;

IV. Acknowledge the importance of service settlements, villages, rural serviced settlements and hinterlands in suburban and rural locations in meeting local shopping needs. To encourage the improvement to the designs of local retail centres in suburban areas and rural villages, including the provision of facilities in the public realm;

V. Encourage reductions in floorspace vacancy, taking account of suitability, obsolescence, and the identification of alternative uses for existing vacant floorspace within the urban centres of the County;
VI. Encourage and facilitate the re-use and regeneration of derelict land and buildings for retail uses, with due cognisance to the Sequential Approach as indicated in the Regional Planning Guidelines;
VII. Address leakage of retail expenditure from the County to competing centres by providing the means to strengthen the range and quality of its retail offer; and,
VIII. Engage with the relevant stakeholders and incentivise to ensure that the environmental attractiveness of town/local centres is enhanced.

Specific retail planning objectives for the County are:

Objective WXC01: It is the Council's objective to ensure that all retail development permitted accords with the relevant requirements and criteria as established within the Retail Planning Guidelines for Planning Authorities 2012 and the Wexford County Retail Strategy 2021-2027.

Objective WXC02: It is the objective of the Council to permit retail development within the town centres of a size and scale which is appropriate to the level of the settlement, including its population, as defined within the retail hierarchy.

Objective WXC03: The Council shall resist applications for planning permission which would result in net loss of retail floorspace at ground level on primary retail streets within the core retail area where this would affect the vitality and viability of these streets.

Objective WXC04: The Council shall promote and protect the core retail areas of the four main towns as the preferred locations for retail development.

Objective WXC05: When bringing forward proposals for the creation of significant levels of new retail floorspace, the Council will require applicants to undertake an assessment of the quality and suitability of existing and available floorspace in the County relative to the circumstances of their proposals.

Objective WXC06: It is the objective of the Council to prohibit new retail development if they would (either by themselves or cumulatively with other developments) negatively impact the vitality and viability of existing retail centres within the County. This objective aims to protect the existing vitality and service provision of the town centres by preventing the development of retail enterprises in inappropriate locations or at a scale which would have a negative impact on retail competition within the County.

Objective WXC07: When assessing retail planning applications, it will be the objective of the Council to have regard to the findings of the capacity assessment contained in the Wexford County Retail Strategy 2021-2027, including the ability to counteract expenditure leakage. The onus will be on any applicant to demonstrate in a Retail Impact Assessment that the proposed floorspace is appropriate having regard to the quantum of floorspace required within that specific urban centre or settlement, in addition to evidencing all other relevant variables, as specified within the Retail Planning Guidelines.

Objective WXC08: Retail development on the edge of centre or out of centre sites will not generally be supported.

Objective WXC09: To encourage and facilitate the preservation and enhancement of the retail role of smaller villages and centres around the County.

Objective WXC10: In order to address vacancy levels recorded across the four main towns, it is the Council’s objective to promote the reuse of vacant floorspace within the core retail areas.

Objective WXC11: The Council will encourage alternative, short or interim measures to improve the visual appearance of vacant or derelict properties, including the use of attractive window graphics, shutter covers and hoardings.

Objective WXC12: The Council will encourage 'living over the shop' whereby the upper storeys of buildings have a residential function with the ground floor used for commercial or retail purpose.

Objective WXC13: The Council will encourage the consolidation of other non-retail-based services within town centres, utilising existing vacant retail floorspace where necessary. This will aid in enhancing the vitality of town centres, encouraging them to maintain their role as employment locations in addition to reducing the proportion of vacant floorspace and recognising the value which non-retail uses can contribute to the local economy through the provision of employment and general economic benefit.

Objective WXC14: It is an objective of the Council to introduce measures to improve the accessibility of town centres by developing a pedestrian and cyclist friendly environment, which improves safety and limits traffic congestion where possible.

Objective WXC15: The Council will require a Retail Impact Assessment to be carried out for development proposals outside of lands zoned town centre in the following general circumstances:

a) Proposals featuring greater than 1,000m^2 of net floorspace for both convenience and comparison type developments in the four main towns of Wexford Town, Gorey, Enniscorthy and New Ross;
b) Proposals featuring greater than 500m^2 of net retail floorspace for both convenience and comparison type developments in all other settlements;
c) Where the Planning Authority considers the development may impact on the vitality and viability of a town centre.

The Planning Authority reserves the right to waive the requirement of the Retail Impact Assessment on a case by case basis. The Retail Impact Assessment shall include, at minimum, the criteria set out in the Retail Planning Guidelines (2012).

Objective WXC16: Retail impact assessment and transport impact assessments will be required for significant retail development which due to their scale and/or location may impact on the vitality and viability of town centres.

Objective WXC17: In accordance with the Retail Planning Guidelines (2012), there shall be a presumption against out-of-town warehousing.

Objective WXC18: It is an objective of the Council to ensure that all proposed retailing projects and any associated improvement works or associated infrastructure such as parking facilities, individually or in combination with other plans and projects, are **subject to Appropriate Assessment to ensure there are no likely significant effects on the integrity of any Natura 2000 sites in the County.**

6.3.2 Wexford Town

Strategic

Wexford Town is a Level 1: Regional Key Town appropriate for Major Convenience and Comparison and is the primary retail centre in the County with some 59,946m^2 of net retail floorspace, accounting for 42% of the overall floorspace in the four main towns.

With its pedestrianised streets, the town has a pleasant shopping environment with a relatively good choice of convenience and comparison retail outlets.

There is approximately 951m^2 of identified capacity for additional comparison non-bulky floorspace by 2021, increasing to 5,821m^2 by 2027 and 9,325m^2 by 2031[34]. There will be capacity of approximately 662m^2 in comparison non-bulky floorspace by 2027, increasing to 5,425m^2 by 2031[35].

The sequential approach will be applied to all new retail in the town with a priority to the town centre.

Specific Retail Planning Objectives for Wexford town are:

Objective WX01: To strengthen the role of Wexford as a strategic location, a self-sustaining regional economic driver and Key Town on the Eastern Corridor. Retail is an integral part of the town's economy complementing its inherent strengths including innovation, enterprise, tourism, culture and services and has an important array of amenities, vibrancy, liveability/quality of life and quality built environment.

Objective WX02: To focus on regenerating the traditional town centre and main street areas and how they relate to the expanded town, with a view to creating more attractive, desirable places that people want to live and spend time in, for work, shopping or recreational purposes.

Retail Development Strategy

Objective WX03: To direct retail investment to brownfield sites in the town centre that provide linkage between the quays and the main street.

[34] Figures refer to requirements as adjusted for vacancy (section 5.13) but not pipeline supply (section 5.15).
[35] Ibid

Objective WX04: To promote the development of 'Gateway opportunities' with key development sites on the approach to the retail core that have the potential to redefine the arrival experience to the town for e.g.

- The site at Redmond Road/Redmond Place offers a landmark location from the northern approach
- the Commercial Quay Car park is highly visible viewed from the east
- Trinity Wharf
- Lowney's Mall site provide vital opportunities for regeneration and town centre expansion from the south.

Objective WX05: To encourage the reuse of vacant buildings or under-utilised sites throughout the town. The redevelopment of car parking sites in prime town centre locations are identified for appropriate retail and/or commercial town centre uses.

Objective WX06: The strategy seeks to develop a more integrated town centre from the Quays to North and South Main Street whilst improving east-west connectivity and pedestrian linkages to the emerging Trinity Wharf sustainable urban quarter to increase the connectivity of the town as a whole and aid in ensuring that the economic benefits of the Trinity Wharf project will be realised in the established centre of Wexford Town.

Objective WX07: In areas adjacent/contiguous to the retail core to support the diversity of non-retail uses at street level where such uses attract customers that complement the vitality, vibrancy and activity and bring linked trips to the town centre.

Environment

The improvement of the attractiveness of the town centre street environment is vital for the long-term sustainability of the core and attracting customers. A number of interventions are proposed to encourage access to underutilised segments of the town centre.

Objective WX08: Encourage and support Investment and improvement in the public realm (new attractive hard landscaping/paving, planting and street furniture) is proposed at;

- the passageway which connects North Main Street to Anne Street to support activation to this space;
- both Monck Street and Charlotte Street to complement and enhance these streets as evening and night-time destinations;
- the western section of Common Quay Street (beyond the Super Valu car park entrance) to improve the pedestrian experience and fulfil the potential of the Bull Ring Market area;
- Church Lane intersection with North Main Street, to make it a more attractive pedestrian experience and enhance the setting of St. Iberius' Church;

Shop Fronts, Maintenance and Signage

Objective WX09: Develop a 'Shopfront Improvement Scheme' to improve the design and quality of shop signage throughout the town centre, through the provision of guidance and grant funding enable owners to make improvements to their buildings/shopfronts.

Objective WX10: Seek a reduction, better co-ordination and design of signage generally within the town to avoid clutter and improve way-finding.

Objective WX11: Promote access to Wexford Town's historic town walls through improved signage/street maps to make visitors aware of their presence and location.

Objective WX12: Review and reduce wirescape within the town centre (if possible) which currently serves to detract from the attractiveness of the core retail area.

Initiatives

Objective WX13: Support a pilot programme for the extension of opening hours to allow for late night shopping on South and North Main Street (this could be scheduled to take place alongside one of the town's major festival/events).

Objective WX14: Support retailers and businesses within the town centre and 'Purple Flag' area and promotion of retailers in Wexford Town.

Objective WX15: Support the development of a dedicated business partnership (such as a Wexford Town Team) or similar to provide leadership in the co-ordination and implementation of the Key Actions and Recommendations and to sustainably ensure the overall health and vitality of the town.

Objective WX16: Support the established festivals and events that take place within the town and consider opportunities for further events.

6.3.3 Enniscorthy Town

Strategic

Enniscorthy is a Level 2: Large Sub-Regional Town with a retail function supporting Large to Medium scale convenience and medium scale comparison. Enniscorthy has 11% of the net retail floorspace of the four towns with a net retail floorspace of 16,407m^2.

There is capacity for expansion of town centre retail, where the sequential approach shall direct new retail as a priority to town centre. Additional capacity for convenience floorspace in 2020 of 2,012m^2 is projected, increasing to 4,994m^2 by 2027 and 6,653m^2 by 2031[36]. There is approximately 222m^2 of identified capacity for comparison non-bulky

[36] Figures refer to requirements as adjusted for vacancy (section 5.13) but not pipeline supply (section 5.15).

floorspace by 2021, increasing to 2,509m^2 by 2027 and 4,155m^2 in 2031[37]. There is additional capacity for comparison bulky floorspace 1,338m^2 by 2027, increasing to 2,357m^2 by 2031[38].

Specific retail planning objectives for the town are as follows:

Objective EN01: To protect Enniscorthy's attractive natural setting, architectural heritage and rich historical background, the physical remnants of which form part of the town's most notable assets.

Objective EN02: To improve on and enhance the vitality and viability of the town centre and increase its competitiveness with other retail destinations.

Objective EN03: To regenerate the traditional town centre and main street areas and reengage with the River Slaney with a view to creating more attractive, desirable places that people want to live and spend time in, for work, shopping or recreational purposes.

Objective EN04: To enhance and expand the town centre retail offer and address leakage of retail spending from the town.

Retail Development Strategy

Objective EN05: To enhance the value of the retail experience of the traditional streets of Enniscorthy's core area, while encouraging new investment and development to opportunity sites addressing the river.

Objective EN06: In areas adjacent/contiguous to the core retail area to support the diversity of non-retail uses at street level where such uses attract customers, that complement the vitality, vibrancy and activity and bring linked trips to the town centre.

[37] Ibid
[38] Ibid

Shop Front, Maintenance and Signage

Objective EN07: Develop a 'Shopfront Improvement Scheme' to improve the design and quality of shop signage throughout the town centre, though the provision of guidance and grant funding enable owners to make improvements to their buildings/shopfronts.

Objective EN08: Seek a reduction in, better co-ordination and design of signage generally within the town to avoid clutter and improve way-finding.

Objective EN09: Promote access to Enniscorthy's historic town through improved signage/street maps to make visitors aware of their presence and location.

Environment

The improvement of the attractiveness of the town centre street environment is vital for the long-term sustainability of the retail core and attracting customers.

Objective EN10: A number of interventions are proposed to encourage access to underutilised segments of the town centre:

- Achieve a consistency of treatment and improvement in the public realm at Market Square, Rafter Street, Weafer Street, Irish Street and Slaney Street;
- Review and reduce wirescape within the town centre (if possible) which currently serves to detract from the attractiveness of the core retail area;
- Encourage access from the town centre to the River Slaney by providing pedestrian priority crossings across Island Road at the intersections with Barrack Street, Slaney Street, Slaney Place and Abbey Square.

Initiatives

Objective EN11: Integrate retail investment with the objectives of the 'Enniscorthy Tourism Project' to utilise the substantial architectural, heritage and natural assets of Enniscorthy Town to deliver a compelling visitor experience and solidify Enniscorthy's potential as a long-term sustainable tourist destination.

Objective EN12: Support the key objectives of the Templeshannon Regeneration Strategy, particularly the implementation of the Enniscorthy Flood Defence Scheme and the provision of a new pedestrian bridge across the River Slaney connecting the Town Centre with the railway station'.

Objective EN13: Support enterprise initiatives to develop an NZEB centre of excellence at the new St. Senan's business and synergy with the 'Smart Town' project.

6.3.4 Gorey Town

Strategic

Gorey is a Key Town on Level 2 of the retail hierarchy that has experienced a sustained period of growth in both population and retail expansion since the publication of the guidelines. As such it now accounts for 25% (36,098m^2) of the retail floorspace across the four main towns, second only to Wexford Town. In reflection of this, its status has been elevated since the preparation of the Retail Planning Guidelines to a 'Key Town'.

Gorey has experienced high demand for new retail floorspace with is a total of 4,487m^2 of granted retail development in this catchment area, across 9 applications. There is no additional capacity for convenience floorspace throughout the plan period, including up to 2031[39]. There is additional capacity for comparison non-bulky floorspace of approximately 622m^2 of by 2021, increasing to 3,692m2 by 2027 and 5,900m^2 in 2031[40]. There is approximately 144m^2 of identified additional capacity for comparison bulky floorspace arises by 2027, increasing to 1,546m^2 by 2031[41]. There is a presumption against retail warehousing/out of centre retail park development.

[39] Figures refer to requirements as *adjusted for vacancy* (section 5.13), but not adjusted for pipeline supply (section 5.15).
[40] Ibid
[41] Figures refer to requirements as *adjusted for vacancy* (section 5.13), but not adjusted for pipeline supply (section 5.15).

Specific Retail Planning Objectives for the town are:

Objective GY01: To protect and enhance the amenities of the town centre whilst ensuring that retail floorspace is developed in a sustainable manner that complements the improvement of the town overall.

Objective GY02: To strengthen the role of Gorey as a Key Town, where retail is an integral part of the town's economy complementing an important array of amenities, vibrancy, liveability/quality of life and quality built environment.

Retail Development Strategy

Objective GY03: To continue to support the retail core area based around the Main Street as a compact and attractive town centre with a strong retail sector with a particularly strong reputation for comparison goods. Any new retail expansion shall be restricted to the town centre area abutting the defined core area.

Objective GY04: The primary retail function of ground floors on the Main Street will be protected so that only services or commercial activities that support the vibrancy and viability of the town centre, attract customers on linked trips and complement the primary retail function of the core area.

Environment

Gorey is also a walkable town and has a pleasant and well-maintained public realm.

Objective GY05: To protect and enhance Gorey's assets integral to the town's economy:

- Introduce up to three pedestrian priority crossings along Main Street to further promote pedestrian activity within the town and retail centre;
- Improve the pavement and hard landscaping along Main Street;
- Consider rearrangement of Market Square and improve its public realm offering through provision of soft landscaping to aid in making it a destination point within the town;

- Improve the landscaping scheme at the western entrance to the town (adjacent to the Tesco roundabout) to provide a more visually appealing gateway into Gorey;
- Improve directional signage from Gorey shopping centre to the town centre;
- Review and reduce wirescape within the town centre (if possible) which currently serves to detract from the attractiveness of the core retail area;

Shop Front, Maintenance and Signage

Objective GY06: To promote a 'Shopfront Improvement Scheme' to enable owners to make improvements to their buildings/shopfronts within the retail core through grant funding, so as to continually improve design and quality of the street frontage.

Initiatives

Objective GY07: Continue to support the established festivals and events that take place within Gorey and consider opportunities for further events.

6.3.5 New Ross Town

Strategic

New Ross is a Level 2: Large Sub-Regional Town in accordance with the Retail Planning Guidelines providing for Large to Medium scale convenience and medium scale comparison retail, primarily functioning as a retail centre for the Municipal District. New Ross has 22% of the overall retail floorspace within the four main towns which accounts for 31,177m^2, with the largest offering of bulky goods retail floorspace in the County (35% of the total County Bulky goods provision).

There is approximately 672m^2 of identified additional capacity in convenience floorspace arising by 2027, increasing to 1,929m^2 by 2031[42]. There is no additional capacity for

[42] Figures refer to requirements as *adjusted for vacancy* (section 5.13), but not adjusted for pipeline supply (section 5.15).

comparison non-bulky floorspace or comparison bulky floorspace throughout the plan period, including up to 2031[43].

Specific Retail Planning objectives for the town are:

Objective NR01: To maximise the potential of retail investment to improve urban infrastructure and amenities and enhance liveability/ quality of life and the quality of the built environment. The major focus of the strategy is to improve quality of the retail core area to attract customers to the town centre and engage with a number of diverse economic and social activities with a view to creating more attractive, desirable places that people want to live and spend time in, for work, shopping or recreational purposes.

Objective NR01: To direct investment in retail, commercial and services to the primary retail area centred on South Street, North Street, Charles Street, Quay Street and Opportunity sites.

Objective NR02: To direct retail investment to brownfield sites in the town centre that provide linkage with the main street and support investment in the core area.

Objective NR03: The sequential approach will be applied to all new retail in the town with a priority to town centre.

Retail Development Strategy

The retail strategy seeks to build on the significant assets of New Ross with its riverside setting, and heritage streetscapes. The new bypass presents opportunities to reimagine the town with decreased through-traffic.

[43] Ibid

Objective NR04: To encourage additional trade within the retail core area of South Street and North Streets and to improve the overall condition and environment of the town centre.

Objective NR05: In areas adjacent/contiguous to the defined retail core area to support the diversity of non-retail uses at street level where such uses attract customers that complement the vitality, vibrancy and activity and bring linked trips to the town centre

Objective NR06: To encourage the reuse of vacant buildings or under-utilised sites throughout the town. The redevelopment of car parking sites in prime town centre locations are identified for appropriate retail and/or commercial town centre uses

Environment

Objective NR07: To examine pedestrianisation and public realm improvements (new attractive hard landscaping, planting and street furniture) of North Street to encourage pedestrian activity within the core retail area. This could be trialled initially to determine its success. If successful, the bollards which delineate pedestrian and vehicular movement on North Street could be removed to reduce street clutter.

Objective NR08: To examine providing a pedestrian priority crossing at the junction of North Street and Mary Street (directly to the front of the Tholsel building).

Objective NR09: Review and reduce wirescape within the town centre (if possible) which currently serves to detract from the attractiveness of the core retail area.

Shopfronts, Maintenance and Signage

Objective NR10: Support a 'Shopfront Improvement Scheme' to enable owners to make improvements to their buildings/shopfronts within the retail core through grant funding.

Objective NR11: Improve signage at strategic locations along the Quay to encourage people to move into the town centre.

Objective NR12: Seek a reduction, better co-ordination and design of signage generally within the town to avoid clutter and improve way finding.

Initiatives

Objective NR13: Promote New Ross's extensive bulky goods offering. This could enable it to become a regional destination for such goods and provide overspill activity within the town centre.

Objective NR14: Establish a local retail consortium to consider adjusting the retail offering in New Ross to fully capture the potential of visitors attracted to the town by the established tourism offering'

6.4 Criteria for Assessment of Retail Development

In accordance with the Retail Planning Guidelines for Planning Authorities all applications for significant development should be assessed against a range of criteria as set out below.

6.4.1 The Sequential Test

All applications for retail developments at edge-of-centre or out-of-centre locations (i.e. outside of the defined core retail areas) will be subject to the sequential test, where the following applies:

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

Where retail development on an out-of-centre site is being proposed, only in exceptional circumstances where the applicant can demonstrate ***and*** *the planning authority is satisfied that there are no sites or potential sites either within the centre of a city, town or designated district centre or on the edge of the city/town/district centre that are (a)* ***suitable*** *(b)* ***available*** *and (c)* ***viable,*** *can that out-of-centre site be considered.*

6.4.2 Retail Impact Assessments

Retail Impact Assessments will be required for significant retail development where due to its scale and/or location; it may impact on the vitality and viability of centres. Significant retail development in County Wexford constitutes development proposals for both comparison and convenience type development of:

- greater than $1000m^2$ of net floorspace in the four main towns;
- greater than $500m^2$ in the other settlements;
- or where Wexford County Council considers the development may impact on the vitality and viability of a town centre

These assessments will be prepared in accordance with the current Retail Planning Guidelines and any subsequently published guidelines, which requires an applicant to address the following criteria and demonstrate whether or not the proposal would:

- Support the long-term strategy for city/town centres as established in the development plan, and not materially diminish the prospect of attracting private sector investment into one or more such centres;
- Have the potential to Increase employment opportunities and promote economic regeneration;
- Have the potential to increase competition within the area and thereby attract further consumers to the area;
- Respond to consumer demand for its retail offering and not diminish the range of activities and services that a centre can support;
- Cause an adverse impact on one or more centres, either singly or cumulatively with recent developments or other outstanding planning permissions (which have a

realistic prospect of implementation) sufficient to undermine the quality of the centre or its wider function in the promotion and encouragement of the arts, culture, leisure, public realm function of the town centre critical to the economic and social life of the community;

- Cause an increase in the number of vacant properties in the primary retail area that is likely to persist in the long term;
- Ensure a high standard of access both by public transport, foot and private car so that the proposal is easily accessible by all sections of society; and/or
- Link effectively with an existing city/town centre so that there is likely to be commercial synergy.

6.4.3 Traffic and Transport Assessments

A Traffic and Transport Assessment (TTA) may be required for retail developments outside of town centre sites over a particular threshold (1,000m2), as set out in the *Traffic Management Guidelines* 2003, and the *Traffic Transport Assessment Guidelines* 2014.

A TTA must examine the transport impacts of a proposed development, incorporating any subsequent measures necessary to ensure roads, junctions and other transport infrastructure in the vicinity of the development are adequate to accommodate the proposed development without causing additional delays to existing and future road-based traffic. More importantly, TTA is important in demonstrating how to encourage a shift towards sustainable travel modes by those using the retail development in question.

Applicants for retail development which exceed these thresholds should consult the guidelines above prior to lodging a planning application. Where traffic and transport volumes from proposed retail developments are under the thresholds for TTA outlined above, the guidelines should be consulted in regard to the criteria for sub threshold TTA. The TTA should also address urban design impacts of proposed public and private transport proposals and also deal with delivery and monitoring regimes for the various options. If the proposed development warrants an Environmental Impact Assessment (EIA), the transport assessment should form part of the EIA.

6.4.4 Design Quality

The 2012 Retail Planning Guidelines are accompanied by the Retail Design Manual (April 2012). The Manual provides planning authorities, developers and designers with evidence-based quality principles to ensure that future planning for the retail sector is focussed on the creation of vibrant, quality places.

6.4.5 Criteria for the Assessment of Different Development Types

Large Convenience Stores

New large convenience stores should be located within the town centres that serve a large residential community where possible.

Edge of centre locations for such developments will only be considered in exceptional circumstances where there is limited room for expansion within an existing town centre, as the urban grain of many town centres do not lend themselves to being suitable for larger form convenience stores.

Accessibility is also a key consideration for such developments and as such it is imperative that proposals for large convenience stores are accessible by all modes of transport including pedestrians and by public transport.

Within County Wexford a retail floorspace cap of 3,000m^2 for large convenience goods stores will be applied. This applies to new stores as well as to extensions of existing retail units. For a large-scale proposal encompassing both convenience and comparison goods no national cap applies to the comparison element and this will be assessed having regard to the location, nature and scale and impact on comparison shopping in the core area. In these instances, the application drawings should clearly delineate the floorspace to be attributed to the convenience and comparison-shopping types.

The balance between the convenience and comparison element of the proposed store drawings is a critical element in the assessment of the suitability of the development proposal. Where a significant element of the store is indicated to be for comparison goods, the potential impact of that element of the store on existing comparison goods stores within the catchment area will be considered in the assessment of the application

Policy for Neighbourhood Centres

The majority of neighbourhoods within the 4 main towns are well served by convenience retail. However, there are areas such as the eastern side of Enniscorthy which are deficient in the retail offer available to the local residents. Neighbourhood centres in new residential neighbourhoods may also be required.

The location for such developments will be determined in the local area plans and developments would be subject to retail assessments. Convenience should be of a scale to serve the local community and stores should not exceed 2000 sq. m in such developments.

Retail Warehouses

In accordance with the Retail Planning Guidelines there should be **a presumption against the further development of out of town retail parks** and a preference for sites in or adjacent to town centres to ensure the potential for linked trips and commercial synergy, and that over the lifetime of this plan these developments will not generally be supported. Key criteria for the assessment of retail warehouse applications include scale and design of the development, appropriate vehicular access and the quantitative need for such development.

In accordance with the Retail Planning Guidelines within County Wexford the following caps on floorspace of such retail development shall be applied (gross floorspace quoted including storage and garden centres):

- individual retail units should not be less than 700m2
- Individual retail units shall not be more than 6,000m2 in size (gross floorspace including storage and garden centres).

Furthermore, the range of goods sold shall be restricted by planning condition to bulky goods as those defined within Annex 1 of the Regional Planning Guidelines. These include but are not limited to household appliances, bulky pet products, tools and equipment for the house and garden, furniture and furnishings.

Within proposals for such retail development, the proportion of ancillary retail floorspace associated with otherwise bulky good items shall not exceed 20% of the total net retail floorspace of the unit. The planning application drawings should clearly delineate the provision of floorspace associated with each retail type so that the County Council can make an appropriate assessment.

Factory Shops

Factory shops, commonly located as part of or adjacent to the production facility, should be restricted by way of condition to the sale of products produced by associated factory, unless situated within the core retail area of the centre in which it is located. Proposals for individual factory shops may be appropriate, provided the scale of the shop is appropriate to its location and raises no issues in relation to the vitality and viability of nearby urban centres.

Outlet Centres

The Retail Planning Guidelines define outlet centres as “groups of stores retailing end-of-season or discontinued items at discounted prices and are typically located in out-of-centre locations”. The success of these centres depends on drawing customers and visitors from a wide catchment area, including tourists and as such there may be implications for existing tourist centres and established town centres. Having regard to scale of catchment, it is not anticipated that there is a demand for such centres in the Plan area over lifetime of plan.

The assessment of such retail development should focus on whether such a development is located in a strategic location to capture expenditure from a very wide catchment area.

Moreover, it is the duty of the applicant to demonstrate that the products sold will not be in competition with those currently on sale in typical town centre locations within the County.

Nonetheless, outlet centres within or immediately adjacent to a city or town centre can generate commercial synergies with the established retail outlets, thus raising the profile of the centre and enhancing aggregate turnover on retail goods and leisure activities, resulting in economic benefits for the overall area. Given the extent of the catchment of County Wexford Towns it is considered that such centres would be appropriate during the lifetime of the plan.

In accordance with the Retail Planning Guidelines, outlet centres in County Wexford will not be permitted in more remote out-of-town locations.

Local Shops

Local shops play a vital role in catering for the daily needs of nearby residents or of those passing by. Primarily convenience outlets and local shops provide a readily accessible service for basic goods, often for the less mobile members of communities.

The planned development of such local shops should be encouraged in large or growing residential catchments. Such developments should be designed to a high standard and be easily accessible to all members of society.

Retailing and Motor Fuel Stations

Local shops attached to petrol filling stations are a growing sector of the retail market. However, the size of the shop associated with any petrol filling station should take account of the fact that large shops can attract additional custom, large numbers of cars can cause disruption and the preferred location for retailing is in town centres.

The Retail Planning Guidelines state that the size of such retail units should not exceed 100m2. Therefore, where applications made for retail units associated with a petrol filling station are in excess of 100m2 the sequential approach to retail development will apply.

Retailing in Small Towns and Villages

Small towns, villages, and local centres play an important role in the County Wexford retail hierarchy, fulfilling the everyday needs of the communities they serve. Retail development should be focused in the centres of these small towns and villages and should complement the existing retail provision.

They should also be located in areas of high accessibility to the areas they serve. Such retail development should be encouraged at a scale that is appropriate to the role of the relevant town or village as defined in the County Wexford retail hierarchy.

Retailing in Rural Areas

Retailing in rural areas in County Wexford should be directed towards existing settlements, with development in the countryside generally restricted. It is recognised, however, that there may be exceptional circumstances where the development of certain types of retail units in rural areas could be acceptable. These include:

- retail unit which is ancillary to activities arising from farm diversification;
- a retail unit designed to serve tourist or recreational facilities, and secondary to main use;
- small scale retail unit attached to an existing or approved craft workshop retailing the product direct to the public.

Casual Trading

Casual trading, including farmers markets can make a significant contribution to the local economy, contributing to the vitality and viability of a retail centre. Such activities should be properly regulated as per the provisions of the casual trading act 1995.

Monitoring and Review

The Retail Planning Guidelines advise planning authorities to regularly monitor trends in their areas, and update retail policies as appropriate. Recognising that the retail sector is one of the most dynamic sectors in the economy and that related trends, influences and information can change over time, the Council is committed to monitoring the contents of this strategy to ensure that:

I. The Retail Strategy and its baseline data are kept as up to date as possible;

II. Mechanisms that are in place to monitor the progress of the strategy are appropriate and fit for purposes; and

III. The Council can intervene in a positive and timely manner to address changing circumstances, as necessary.

7.0 Conclusion

The Wexford County Retail Strategy 2021-2027 has been prepared for the Wexford County Council in accordance with the requirements of the Retail Planning Guidelines, 2012. The policies which have been formulated as part of this Retail Strategy will be implemented as part of the Wexford County Development Plan 2021-2027.

In compiling this Retail Strategy, due regard has been had to the most up to date information regarding population growth projections, the prevailing economic outlook and retail sales information. This has been used to provide a firm basis on which to inform future policy direction with the aim of enhancing and developing the retail offering of County Wexford and the settlements therein.

Appendix A - Results of Pedestrian Counts

Wexford Town-Day 1

Location:	Wexford Town WX1		
Start Time:	11am	2pm	4pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, misty/dry
Any notable events or unusual circumstances?	None	None	None
Count	48	63	51
Location:	Wexford Town WX2		
Start Time:	11am	2pm	4.30pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, misty/dry
Any notable events or unusual circumstances?	None	None	School collection
Count	216	232	253
Location:	Wexford Town WX3 (Penney's on main pedestrian street)		
Start Time:	11am	2pm	4pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, misty/dry
Any notable events or unusual circumstances?	None	None	None
Count	313	310	267
Location:	Wexford Town WX4		
Start Time	11am	2pm	4pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, misty/dry
Any notable events or unusual circumstances?	None	None	None
Count	227	287	344

Wexford Town-Day 2

Location:	Wexford Town WX1		
Start Time:	10.30am	1.30pm	4pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, misty/dry
Any notable events or unusual circumstances?	None	None	None
Count	56	88	67
Location:	Wexford Town WX2		
Start Time:	11am	2pm	3.45pm
Weather conditions:	Dry, Cloudy	Dry, Cloudy	Dry, Cloudy
Any notable events or unusual circumstances?	None	None	None

Count	149	235	175
Location:	Wexford Town WX3 (Penney's on main pedestrian street)		
Start Time:	10.45am	1.30pm	4pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, misty/dry
Any notable events or unusual circumstances?	None	None	None
Count	295	260	210
Location:	Wexford Town WX4		
Start Time	10.45am	2pm	4pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, Dry
Any notable events or unusual circumstances?	None	None	None
Count	224	316	272

Wexford Town – Day 3

Location:	Wexford Town WX1		
Start Time:	11am	1.30pm	4pm
Weather conditions:	Windy, warm, cloudy	Windy, warm, cloudy	Sunny, warm
Any notable events or unusual circumstances?	None	None	None
Count	58	83	164
Location:	Wexford Town WX2		
Start Time:	11am	2pm	3.45pm
Weather conditions:	Windy, warm, cloudy	Windy, warm, cloudy	Sunny, warm
Any notable events or unusual circumstances?	Craft food market	Craft food market	Craft food market
Count	200	284	409
Location:	Wexford Town WX3 (Penney's on main pedestrian street)		
Start Time:	10.45am	1.30pm	4pm
Weather conditions:	Windy, warm, cloudy	Windy, warm, cloudy	Sunny, warm
Any notable events or unusual circumstances?	None	None	None
Count	466	807	895
Location:	Wexford Town WX4		
Start Time	10.45am	2pm	4pm
Weather conditions:	Windy, warm, cloudy	Windy, warm, cloudy	Sunny, warm
Any notable events or unusual circumstances?	None	None	None
Count	169	683	801

New Ross – Day 1

Location:	New Ross NR1 South Main Street		
Start Time:	11.45am	2 pm	4.15pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, misty/dry
Any notable events or unusual circumstances?	None	None	None
Count	85	113	95
Location:	New Ross NR2 North Main Street		
Start Time:	11.15am	2.15pm	4.15pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, Dry
Any notable events or unusual circumstances?	None	None	None
Count	45	46	34
Location:	New Ross NR3– Quays		
Start Time:	11.50am	2pm	4pm
Weather conditions:	Cold, Foggy	Cold, Dry	Cold, Dry
Any notable events or unusual circumstances?	None	None	None
Count	34	31	29

New Ross – Day 2

Location:	New Ross NR1 South Main Street		
Start Time:	11.30 am	2pm	4.15pm
Weather conditions:	Cold, Dry	Cold, Overcast	Cold, Foggy
Any notable events or unusual circumstances?	None	None	None
Count	85	102	105
Location:	New Ross NR2 North Main Street		
Start Time:	11am	2pm	4pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, misty/dry
Any notable events or unusual circumstances?	None	None	None
Count	22	40	42
Location:	New Ross NR3– Quays		
Start Time:	11am	13.30pm	4pm
Weather conditions:	Cold, Dry	Cold, Dry	Dry, Overcast
Any notable events or unusual circumstances?	None	None	None
Count	20	38	52

New Ross – Day 3

Location:	New Ross NR1 South Main Street		
Start Time:	11.30 am	2pm	4.15pm
Weather conditions:	Dry, cool	Sunny, warm	Sunny, warm
Any notable events or unusual circumstances?	Nutshell Café attracting footfall	Nutshell Café attracting footfall	Nutshell Café attracting footfall
Count	135	113	107
Location:	New Ross NR2 North Main Street		
Start Time:	11am	2pm	4pm
Weather conditions:	Dry, cool	Sunny, warm	Sunny, warm
Any notable events or unusual circumstances?	None	None	None
Count	70	60	50
Location:	New Ross NR3– Quays		
Start Time:	11am	13.30pm	4pm
Weather conditions:	Dry, cool	Sunny, warm	Sunny, warm
Any notable events or unusual circumstances?	ATM attracting footfall	ATM attracting footfall	ATM attracting footfall
Count	47	38	43

Enniscorthy -Day 1

Location:	Enniscorthy – E1		
Start Time:	10.45am	1.30pm	4pm
Weather conditions:	Mild and dry	Mild and dry	Cold, Foggy
Any notable events or unusual circumstances?	None	None	None
Count	67	85	103
Location:	Enniscorthy – E2		
Start Time:	11am	1.30pm	4.15pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, Foggy
Any notable events or unusual circumstances?	None	None	None
Count	127	117	103
Location:	Enniscorthy – E3		
Start Time:	10.45am	13.45pm	4pm
Weather conditions:	Dry, Mild	Cold, Dry	Cold, Foggy
Any notable events or unusual circumstances?	None	None	None
Count	53	24	19

Enniscorthy -Day 2

Location:	Enniscorthy – E1		
Start Time:	11.30 am	2pm	4.15pm
Weather conditions:	Dry, Cold	Dry, Cold	Cold, Rain
Any notable events or unusual circumstances?	None	None	None
Count	162	93	159
Location:	Enniscorthy – E2		
Start Time:	11am	2pm	4pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, misty/dry
Any notable events or unusual circumstances?	None	None	None
Count	275	309	159
Location:	Enniscorthy – E3 (Irish Street – close to Dunnes Stores)		
Start Time:	11am	13.30pm	4pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, Misty
Any notable events or unusual circumstances?	None	None	None
Count	96	102	106

Enniscorthy – Day 3

Location:	Enniscorthy – E1		
Start Time:	11.30 am	2pm	4.15pm
Weather conditions:	Mild, cloudy	Mild, cloudy, windy	Partly cloudy, warm
Any notable events or unusual circumstances?	None	Communion event increasing footfall	Communion event increasing footfall
Count	47	71	22
Location:	Enniscorthy – E2		
Start Time:	11am	2pm	4pm
Weather conditions:	Mild, cloudy	Mild, cloudy, windy	Partly cloudy, warm
Any notable events or unusual circumstances?	None	Communion event increasing footfall	Communion event increasing footfall
Count	167	282	216
Location:	Enniscorthy – E3 (Irish Street – close to Dunnes Stores)		
Start Time:	11am	13.30pm	4pm
Weather conditions:	Mild, cloudy	Mild, cloudy, windy	Partly cloudy, warm
Any notable events or unusual circumstances?	None	Communion event increasing footfall	Communion event increasing footfall
Count	154	150	155

Gorey -Day 1

Location:	Gorey G1 Main Street		
Start Time:	10.30 am	2pm	4pm
Weather conditions:	Cold, Dry	Cold, Overcast	Cold, Foggy
Any notable events or unusual circumstances?	None	None	None
Count	186	405	329
Location:	Gorey G2 Esmonde Street		
Start Time:	10.50am	1.30pm	4pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, misty/dry
Any notable events or unusual circumstances?	None	Students on lunch	Students finished school
Count	91	186	141
Location:	Gorey G3 Outside Gorey Shopping Centre		
Start Time:	11.20am	2.30pm	4pm
Weather conditions:	Cold, Dry	Cold, Dry	Dry, Overcast
Any notable events or unusual circumstances?	None	None	A lot of students
Count	80	60	120

Gorey -Day 2

Location:	Gorey G1 Main Street		
Start Time:	11.30 am	2.20pm	4.20pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, Dry
Any notable events or unusual circumstances?	None	None	None
Count	183	236	240
Location:	Gorey G2 Esmonde Street		
Start Time:	11.45am	2.45pm	4.05pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, Dry
Any notable events or unusual circumstances?	None	None	Students finished school
Count	81	72	68
Location:	Gorey G3 Outside Gorey Shopping Centre		
Start Time:	10.45am	2.05pm	4.45pm
Weather conditions:	Cold, Dry	Cold, Dry	Cold, Dry
Any notable events or unusual circumstances?	None	None	None
Count	28	50	55

Gorey – Day 3

Location:	Gorey G1 Main Street		
Start Time:	11.30 am	2.20pm	4.20pm
Weather conditions:	Cloudy, warm	Sunny, warm	Sunny, warm
Any notable events or unusual circumstances?	None	None	None
Count	138	320	21
Location:	Gorey G2 Esmonde Street		
Start Time:	11.45am	2.45pm	4.05pm
Weather conditions:	Cloudy, warm	Sunny, warm	Sunny, warm
Any notable events or unusual circumstances?	Busker playing music	None	Students finished school
Count	96	145	54
Location:	Gorey G3 Outside Gorey Shopping Centre		
Start Time:	10.45am	2.05pm	4.45pm
Weather conditions:	Busker playing music	Sunny, warm	Sunny, warm
Any notable events or unusual circumstances?	None	None	None
Count	21	54	37