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Retail Strategy for County Carlow
Carlow County Development Plan 2022-2028

Adopted 23rd May 2022

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Introduction and Purpose

The Guidelines for Planning Authorities Retail Planning (RPGs), 2012 were issued by the Department of the Environment, Community and Local Government with the aim of ensuring that the planning system continues to play a key role in supporting competitiveness in the retail sector and promoting and supporting the vitality and viability of city and town centres[1]. While the national level planning context has changed since the adoption of the RPGs, the Regional Spatial and Economic Strategy (RSES) for the Southern Region aligns with and supports the full implementation of the RPGs to ensure that retail development is focussed on settlement centres with the application of a sequential approach for retail development[2]. It is a specific objective of the RSES, RPO 55, to prepare Retail Strategies in accordance with the RPGs.

The RPGs require that Development Plans set out clear evidence-based policies and objectives in relation to retailing, setting out eight specific items that must be covered[3]. This Retail Strategy has been prepared by Avison Young in line with the requirements of the RPGs and to inform the review of the Carlow County Development Plan, 2022-2028 (new CDP). It provides guidance, policies and objectives for retail development at a strategic level and aims to ensure a co-ordinated, sustainable approach to the assessment and provision of retail development within the County. The Strategy will be incorporated into the new CDP and will guide the assessment of planning applications for retail developments.

The previous Carlow County Retail Strategy, 2015 was prepared in 2014/2015. As the retail landscape is constantly changing there is a need to understand the development of shopping habits and retail environment since then as well as the wider changes in the economy, such as the impacts of BREXIT and Covid-19. This Retail Strategy has regard to such trends and seeks to understand and quantify their potential impact on the retail sector.

Approach

This Retail Strategy has been undertaken in an unprecedented time, when the Country is under a national lockdown for public health reasons due to the Covid-19 Pandemic. As a result there have been a number of challenges in delivering the Strategy as non-essential retail is closed, people must stay local and at risk cohorts are being ask to limit interactions.

The approach adopted in undertaking this Retail Strategy has had to consider how to address and overcome these challenges, specifically in the review and updating of the retail floorspace figures, the health checks and the household surveys. While on the ground survey work was not practical or viable, desktop research on floorspace, and the innovative application of retail trends to the previously undertaken household surveys, have been utilised to update information where required. The latter is considered to be a more accurate means of updating this information than undertaking a new household survey in the current temporarily restricted and altered retail environment.

Overall this Strategy has been undertaken in accordance with the guidance and requirements of the RPGs and includes the following analysis, assessment, guidance and recommendations:

- **Policy Analysis**: National, regional and local policies were reviewed, including the National Planning Framework (NPF) and the RSES for the Southern Region both of which were adopted since the previous Retail Strategy. Particular regard was had to the retail hierarchy and relevant policies and guidance.
- **Retail Trends**: A review of recent retail trends and performance was undertaken including the potential impact of BREXIT and the Covid-19 Pandemic and the influence, if any, on the retail profile and function of County Carlow.
- **Retail Hierarchy and Identification of Core Retail Areas**: This Retail Strategy confirms the retail hierarchy for the County set out in the previous Retail Strategy and re-examines and identifies Core Retail Areas for the main urban centres within the County.

- **Update Floorspace Survey**: The floorspace survey undertaken as part of the previous Retail Strategy, to establish existing levels of retail provision in the Study Area, has been updated through desktop research.
- **Update Household Survey**: The household survey undertaken in 2014 as part of the previous Retail Strategy to establish the existing shopping patterns within County Carlow, has been updated utilising findings in relation to retail trends.
- **Qualitative Survey**: The qualitative health check survey contained in the previous Retail Strategy that assess the level of vitality and viability of the key centres of Carlow was updated through desktop research, the review of the Town and Village Health Checks undertaken in 2017 and the Town and Village Key Project Plans for Tullow undertaken in 2018 and local knowledge. The Health Checks assess the strengths and weaknesses of the Towns in retail terms as well as identifying opportunity sites for retail development and expansion.
- **Quantitative Analysis:** This analysis identifies the potential for additional retail floorspace within the County based on an overview of population projections, expenditure analysis and turnover analysis.

The Retail Strategy delivers the following outputs:

- Population forecasts in accordance with the growth rates set out in the RSES for the Southern Region.
- The convenience and comparison expenditure based on the most up to date information from the Central Statistics Office (CSO).
- The extent of existing floorspace and its turnover.
- The extent of permitted but extant retail floorspace and existing vacant floorspace within County Carlow.
- An analysing of the above listed data to determine the potential convenience and comparison spend available to support new retail floorspace to 2027.
- Sets out a strategy for the delivery of retail floorspace in Carlow to 2027.
- Recommendations for assessment criteria for retail development in County Carlow.

Deliverables

Based on the preceding qualitative and quantitative analysis and other assessments, this Retail Strategy establishes capacity, a vision, policies and actions relating to retailing in County Carlow, in line with the requirements of the RPGs.

The Strategy considers the future options and potential for retail growth in Carlow and provides policies in support of the delivery of a unique and distinctive retail offer for the key urban centres within the County.

Policy Context

2

Introduction

This Section provides an overview of the planning policy and guidance that has informed the production of the Retail Strategy. Since the previous Retail Strategy was undertaken the national and regional planning context has changed with the replacement of the National Spatial Strategy with the National Planning Framework (NPF) and the Regional Planning Guidelines for the South East Region superseded by the Regional Spatial and Economic Strategy (RSES) for the Southern Region.

The NPF sets out the long-term strategic vision at the national level and lays the foundation for the RSESs for each Region. The RSES for the Southern Region has been produced in accordance with the provisions of the NPF, setting out guidance, policies and population projections for the region. Specifically, the RSES for the Southern Region supports the full implementation of the RPGs, and includes the objective that retail strategies are prepared in accordance with the RPGs, RPO 55.

The Carlow County Development Plan, 2015-2021 is the current statutory plan that sets out the policies and guidance to direct the growth and sustainable development of the County. It was prepared under the previous national and regional planning guidance framework and is currently being reviewed. This Retail Strategy will inform the retail section of the new Carlow County Development Plan, 2022-2028 and will be included as an appendix to same.

The following provides a review of the relevant planning documents that have been referred to in the production of this Retail Strategy. It encompasses national, regional and local level documents including the review of relevant plans outside of County Carlow.

National Level

National Planning Framework

As part of Project Ireland 2040 the NPF provides a planning framework to guide development and investment over the coming years. Its sister document, the National Development Plan (NDP), sets out a 10-year public capital investment strategy of nearly €116 billion to facilitate the delivery of the NPF.

The NPF provides the overarching policy and planning structure for the social, economic and cultural growth of the Country . It is a national document that will direct the country's strategic planning and development at a high level over the next 20+ years, so that growth is sustainable, in economic, social and environmental terms, as the population rises. It focuses on the ways in which long-term planning will change where people live, where people work, how individuals travel, the quality of life and the environment.

The ambition of the NPF is to create a single vision, a shared set of goals for every community across the Country. These goals are expressed as National Strategic Outcomes (NSOs) and their delivery is at the core of the NPF. The below NSOs were of particular note in undertaking this Retail Strategy:

- **Compact growth**: Managing the sustainable growth of compact towns, cities and villages and creating more desirable places for people to live and work in.
- **Enhanced Regional Accessibility:** Enhance accessibility between main population centres in urban areas and their regions. The goal is to ensure that all regions and metropolitan areas in the country have a high level of connectivity to Dublin as well as each other.
- **A Strong Economy**: This outcome will depend on the development of locations that can encourage business and innovation and attract investment and talent. To achieve this result, development and place-making coordination with investment in world-class infrastructure will be needed to promote economic competitiveness and business growth.
- **Enhanced Amenity and Heritage**: This outcome will ensure that our towns, cities and villages are appealing and that they can deliver a good quality of life. Investment in well-designed public areas, including public spaces, parks and highways, as well as recreational facilities, would be needed.

The NPF identifies Carlow as being located within the South East Region of the Country, for which the NPF sets out the below objective:

> **"Regional opportunities to leverage growth include national and international connectivity, especially via ports proximate to continental Europe, such as Belview and Rosslare-Europort, strengthening HEIs and further balanced employment and housing development in key settlements and county towns. This must be based on infrastructure and quality of life, rather than long distance commuting to Dublin, as is apparent in part of counties Carlow and Wexford in particular[4]."**

The NPF also provides policies,structured under National Policy Objectives (NPOs). Of particular note in the preparation of this Retail Strategy are the following:

- **National Policy Objective 4**: Ensure the creation of attractive, liveable, well designed, high quality urban places that are home to diverse and integrated communities that enjoy a high quality of life and well-being.

- **National Policy Objective 5**: Develop cities and towns of sufficient scale and quality to compete internationally and to be drivers of national and regional growth, investment and prosperity.
- **National Policy Objective 6:** Regenerate and rejuvenate cities, towns and villages of all types and scale as environmental assets, that can accommodate changing roles and functions, increased residential population and employment activity and enhanced levels of amenity and design quality, in order to sustainably influence and support their surrounding area.
- **National Policy Objective 10b**: Regional and Local Authorities to identify and quantify locations for strategic employment development, where suitable, in urban and rural areas generally.
- **National Policy Objective 11**: In meeting urban development requirements, there will be a presumption in favour of development that can encourage more people and generate more jobs and activity within existing cities, towns and villages, subject to development meeting appropriate planning standards and achieving targeted growth.

Regard was had to the above provisions of the NPF in the production of this Retail Strategy.

Guidelines for Planning Authorities Retail Planning, 2012

The RPGs were adopted in 2012 and offer consistent retail policy objectives, set out recommendations on specific retail formats, and provide advice on the location of new retail development. The purpose of the RPGs is to ensure that the planning system continues to play a key role in fostering consumer-friendly competition in the retail sector, in line with proper planning and sustainable growth.

The RPGs identify five key national policy objectives;

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

The Guidelines stress that retail development and activity must follow the hierarchy of state. Under the national hierarchy set out in the RPGs Carlow is a Tier 3 sub-regional town. The RPGs state that such centres:

> **"Perform important sub-regional retailing functions including major national retailing chains[5]".**

The Guidelines also include detailed guidance on the content and role of development plans, requiring that development plans must set out specific evidence-based strategies and priorities in relation to retailing. In this regard the RPGs require that development plans:

- State the elements of their settlement hierarchy in line with the relevant regional planning guidelines and their core strategy;
- Outline the level and form of retailing activity appropriate to the various components of the settlement hierarchy in the core strategy;
- Define, by way of a map, the boundaries of the core shopping areas of city and town centres and also the location of any district centres;
- Include a broad assessment (square metres) of the requirement for additional retail floorspace only for those plans in the areas covered by a joint or multi-authority retail strategy;
- Set out strategic guidance on the location and scale of retail development to support the settlement hierarchy, including where appropriate identifying opportunity sites which are suitable and available, which match the future retailing needs of the area;
- Identify sites which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area;
- Include objectives to support action initiatives in city and town centres; such as;
    - Mobility management measures, that both improve accessibility of retail areas while aiming to develop a pedestrian and cyclist

friendly urban environment and vibrant street life;
Public realm interventions, aimed at improving the retailing experience through high quality civic design, provision of attractive street furnishing, lighting and effective street cleaning/business improvement district type initiatives;

- Identify relevant development management criteria for the assessment of retail developments in accordance with these guidelines.

The RPGs also recommend a sequential approach to retail development sites, stating that the priority order for the sequential approach is where necessary, to place retail development in the city/town centres and district centres. Retail development is only to be enabled at the edge of the centre or out of centre locations where all other options have been exhausted.

"There should be a general presumption against large out-of-town retail centres in particular those located adjacent or close to existing, new or planned national roads/motorways[6]".

The RPGs are accompanied by a Retail Design Manual that sets out evidence-based quality principles to ensure that future planning for the retail sector focuses on building attractive, quality places. One of the major messages of the Guidance is that in retail growth, a high standard of design will make a major contribution to achieving quality in the built environment. The Manual recommends that in their forward planning policies and their application, planning authorities should encourage high expectations of design.

Regional Level

Regional Spatial and Economic Strategy for the Southern Region

The RSES for the Southern Region provides the framework for the integration of land use and transport planning in, providing information at all levels on the preparation and execution of plans, programmes and projects. The Southern Region Vision established in the RSES is motivated by the need for fundamental change. By 2040, the region's population is likely to increase by 380,000 to nearly two million people, and this development will require new homes and new jobs.

The RSES for the Southern Region aims to build upon the strengths and potential of the Region to become a more stable, productive, climate-resilient and desirable place region for the benefit of the population. The RSES sets out 11 no. Strategy Statements which seek to build a strong, resilient and sustainable region. Of particular note in relation to County Carlow are the following:

- Strengthening and growing our cities and metropolitan areas; harnessing the combined strength of our 3 cities as a counterbalance to the Greater Dublin Area, though quality development, regeneration and compact growth; building on the strong network of towns and supporting our villages and rural areas
- Enhancing regional accessibility through upgraded transport infrastructure and digital connectivity allied to transformed settlement hierarchy
- Strengthening the role of and improving quality of life in the region's diverse rural areas and communities and valuing our rural region as dynamic, resilient and outward looking
- Transforming our transport systems towards well-functioning, sustainable integrated public transport, walking and cycling and electric vehicles
- Building a competitive, innovative and productive economy
- Optimising our international connectivity through investment and increased capacity in our ports and airports and provision of high-quality digital connectivity throughout the region.
- Strengthening and protecting region's diversity, language and culture, our recreational assets, and our natural and built heritage.
- Safeguarding and enhancing our environment through sustainable development, prioritising action on climate change across the region, driving the transition to a low carbon and climate resilient society
- Providing infrastructure and services in a sustainable, planned and infrastructure-led manner to ensure the sustainable management of water waste and other environmental resources.
- Achieving improved education, health and public services and facilities for all citizens and communities.
- Building an inclusive outward looking international region on the global stage.

The Strategy Statements help strengthen and support Carlow Town's position as a self-sustaining regional and inter-regional economic driver by fostering investment in the Town's strategic job growth potential, while promoting and encouraging economic integration between the County's urban centres, including Tullow and Muine Bheag (Bagnelstown), as well as other urban centres in the Southern and Eastern Regions. In relation to Carlow Town RPO 14 includes the following relevant objectives *inter alia*:

- To support the town centre led economic regeneration of Carlow, leveraging its strategic location and accessibility on inter-regional road and rail networks building upon its inherent strengths of education, connectivity, skills, innovation, enterprise, tourism, culture/ arts and retail services.
- To improve the public realm and attractiveness of the Town Centre through development and connectivity of key urban regeneration locations in the town centre with improved accessibility from the historic town centre to the Railway Station and Fair Green.

The locating of retail development in the Town Centre is in line with the sequential approach of the RPGs as well as the requirement for compact urban growth outlined in the NPF. The RSES for the Southern region recognise the role of retail as a catalyst for the renewal of city, town and village centres. In order to provide more attractive and lively urban centres and village locations that sustain retail development and the larger economy of settlements, the RSES for the Southern Region supports investment in placemaking and developing the public domain. The value of the tourism sector is also recognized, with retail facilities adding to the attraction of tourists and tourist guests, increasing footfall and enhancing vibrancy.

In response to changing patterns of activity, including online shopping, the RSES for the Southern Region champions innovation in the retail sector. The retail business model is moving in a digital direction, and a core part of any digital strategy should be retail. The RSES for the Southern Region state that by delivering a unique retail experience, a Smart City or Town Centre should draw customers and this experience should grow in line with data collected around shopping habits and behaviour. They also promote frameworks to assist conventional retailers in the transition to experiential, technology-led retail models.

The RSES for the Southern Region support the complete implementation of the Retail Planning Guidelines to ensure that urban and village centres are based on retail growth through the application of a sequential retail development strategy. Development plans and local area plans must be informed by collaborative or multi-authority retail initiatives in urban areas reaching through local authority boundaries.

RPO 55 - Retail
It is an objective to:
a. Improve the physical appearance, vitality and vibrancy of city centre, town centre and village locations through collaboration between Planning Authorities and Retail Traders Associations in regeneration / public realm projects and other measures;
b. Ensure that retail development is focused on urban and village centres with the application of a sequential approach to consideration of retail development which does not fall into this category;
c. Prepare Retail Strategies in accordance with the Retail Planning Guidelines including Joint Retail Strategies where applicable. Proposed public realm or urban regeneration projects should be assessed for potential impacts on the receiving environment including capacity of existing services at project level. Where public realm or urban regeneration projects would significantly increase shopper/visitor numbers, planning authorities should ensure that projects include sustainable management of increased demand for access to city/town centre locations.

South-East Regional Enterprise Plan 2020

The South-East Regional Enterprise Plan, 2020 (SEREP) is intended to refresh, refocus and further build on the positive regional cooperation promoted by the Regional Employment Action Plan for the period up to 2020. It takes account of nationally changed and improved economic circumstances, the emergence of new challenges to the development and competitiveness of enterprises and the persistence of uneven economic progress across the regions of Ireland.

The Enterprise Plan is an integral part of the broader policy system that aims to drive economic growth and maintain better living standards across Ireland. In the context of Project Ireland 2040 and more specifically, in the implementation of the NPF and the RSES for the Southern Region, it has an important role to play.

The Enterprise Plan states that the South-East can provide the scale and critical mass to compete nationally and internationally in terms of population base, skills, commercial property solutions and quality of life through collaboration.

The SEREP recognises the need for location-based activities throughout the Region especially in cities and urban centres as well as the availability of urban centres of high quality to live and socialize in with a range of amenities.

Five Strategic Objectives

1 **Enhance the existing environment for enterprise activity and company growth; and build greater resilience into the regional economy.**

2 **Establish the South-East as a place of choice for talent and investment and market the region as such.**

3 **Develop a regional engagement strategy that aligns with the Regional Assembly's RSES and highlights the critical infrastructural developments required to enhance the economic potential in the South East.**

4 **Make the South-East a 'learning region' with education, knowledge generation and exchange, and innovation as central activities that allow all to play a role in the economic, social and cultural development of the Region.**

5 **Develop the South-East as a region that is attractive to both domestic and international visitors with a sense of place and connected tourist amenities.**

Local Level

Carlow County Development Plan, 2015-2021

At the local level, the Carlow County Development Plan, 2015-2021 (CDP) sets out the related policy priorities for Carlow Town. Taking advantage of its strategic regional position, the Development Plan promotes sustainable economic, social and cultural development. The aim of the Development Plan is to achieve a vibrant opportunity county with a high quality of life and an attractive atmosphere of quality.

The existing CDP contains a number of policies that are of note in the preparation of this Retail Strategy as set out below:

- EC 14: To protect and strengthen the retail primacy of Muine Bheag within the County and more specifically within Southern Carlow.
- EC 15: To encourage the development of the retail and service role of Muine Bheag / Royal Oak as a self-sustaining centre in accordance with the policies contained in the Carlow County Development Plan 2015-2021 and the Retail Planning Guidelines 2012.
- EC 16: To protect the retail function of the Core Shopping Area.
- EC 17: To sustain the vitality and viability of the main shopping area and to encourage measures to improve its attractiveness.
- EC 18: To adhere to the provisions of the Sequential Approach in the consideration of retail applications located outside of the Core Retail Area.
- EC 19: To promote and facilitate the development of local markets devoted to the sale of local agricultural and craft produce and support their role as visitor attractions.
- EC 20: To ensure that best quality of design is achieved for all proposed retail developments and that design respects and enhances the specific characteristics of the town.
- EC 21: To pursue all avenues of funding to secure resources for the continued enhancement, renewal and regeneration of the public realm of the Town Centre.
- EC 22: To discourage non-retail and excessive lower grade retail uses, such as, take-aways and betting offices in the core retail area and other principal streets in the town centre, in the interests of maintaining and sustaining the retail attraction of the town centre.
- EC 23: To improve the public realm and support boutique style retailing in the town centre.
- EC 24: To secure the continued consolidation of Muine Bheag Town Centre through progressing the regeneration of back land and brown field areas in the town centre.
- EC 25: To encourage and facilitate the delivery of tourism related retail developments and initiatives in and around the Town Centre.

These policies were informed by the previous Retail Strategy, 2015, which is being updated. The below Retail Hierarchy was provided by the previous Retail Strategy, 2015 and is reviewed in Section 8 of this Retail Strategy.

Level	Category	Place
Level 1	County Town Centre	Carlow Town
Level 2	Sub County Town Centres	• Muine Bheag (Bagenalstown) • Tullow
Level 3	Small Town	• Hacketstown • Rathvilly • Ballon • Leighlinbridge • Carrickduff • Tinnahinch
Level 4	All other Villages/Settlements	All smaller settlements/nodes

Figure 2.1: Carlow County Development Plan - 2015-2021 - Retail Hierarchy

Project Carlow 2040: A Vision for Regeneration

Project Carlow 2040: A Vision for Regeneration is a Regeneration Strategy containing transformational and aspiring ideas for the economic, social and environmental benefit of Carlow to 2040. The long-term vision of the Regeneration Strategy is to transform Carlow Town into a regional powerhouse of sustainable economic growth that will offer business opportunities and a better quality of life for all. Through the implementation of the Strategy Carlow Town will become:

- A centre for education, cutting edge business and high quality retailing.
- A Town that prioritises the wellbeing of its visitors and residents.
- An innovative, ambitious and successful place.

The Strategy focuses development on the Town Centre and identifies opportunities in the built environment and the public realm which can be developed to the benefit of the community and the local economy. In this regard it includes a number of interventions which will act as a catalyst for the regeneration of the Town. Each intervention incorporates key ideas locally within each area, while being aware of the part each intervention will play in the broader Regeneration Strategy for the Town.

In addition to the Intervention Areas, the Strategy also incorporates a number of Character Areas which together, help identify the key characteristics across the Town Centre area. These include a Retail Quarter in the Town Centre with the Strategy stating that it is a key aim to promote 'retail prosperity' at a time when the sector faces challenges. It states that consolidation and linking the modern shopping centre to the east with the retail core will leverage competitive advantages for the Town.

Improving the connections between principal retail, educational and civic spaces in Carlow Town will entice people to spend more time in a vibrant and modern Town Centre, while providing more sustainable forms of movement around the Town. Additionally, this Strategy seeks to re-establish a residential population within the Town Centre through the promotion of and provision for Town Centre living, as well as improved public realm spaces and better access and promotion of civic uses.

Retail Prosperity:

Through continued and active engagement with stakeholders in the Town it is known that the approximate weekly footfall at Fairgreen Shopping Centre is 100,000 with the corresponding figure for the Town Core being 10,000. The bringing together of these two pillars of the Town Centre area will help consolidate the retail offer and build resilience for the retail sector going forward. As we move into a more 'experiential' environment for retail the links between the old and the new have never been as important.

The linking of these areas has been in the pipeline for a long number of years with the time to implement being now. Taken in conjunction with the Rebuilding Ireland secured funding of c.€1.2 million for the refurbishment of the Barrack Street properties, this proposal will ensure the most efficient use of public funds from different sources which together will achieve a greater return on investment[7].

In line with national and regional policy, the Strategy is innovative and offers a transformational sustainable approach to urban regeneration, tailored for Carlow Town. The implementation of the interventions in this Strategy will not only regenerate large areas of the Town Centre but will improve health and wellbeing, create better Town Centre spaces, enhance competitiveness and commercial activity, promote Town Centre living and encourage building enhancements in order to improve the long term viability of Carlow Town.

The Strategy also contains Guiding Principles that seek to address the existing challenges facing Carlow Town by building on the many assets and attractors of the Town including Principle 10: Diversity of uses in the Town Centre:

"The Town Centre has a range of great features. How these features are used will define the future of the Town. Town Centre vibrancy will be enhanced through diversity of use including retail, commercial, start-up, education, hospitality, social and recreation spaces[8]."

In addition, the actions and outcomes of the Strategy include *inter alia*:

- Enhanced retail activity at Town Centre locations
- Resultant increase in footfall will support retail activity, related enterprises and attract new business
- Support family owner and operated businesses, that currently account for a large proportion of the Town's retail offer
- Generate retail prosperity

Link Streets (Dublin St. & Tullow St.) Commercial Activity:

This Intervention will provide a platform for additional commercial activity along Dublin Street and Tullow Street. The Fairgreen Shopping Centre currently experiences an approx. weekly footfall of 100,000 visitors, compared to that of approx. 10,000 visitors to a traditional major retailer in the Town Centre. This contrast in footfall between the peripheral retail core and the historic Town Centre is significant.

This Intervention, through the enhancement of connections between these two core retail areas, as well as to the Civic Spine, will improve overall accessibility within the Town Centre, encouraging a more even distribution of footfall and resulting in improved retail prosperity along these streets.

The enhancement of the streetscapes will also provide an incentive for property owners and businesses in the area to improve their commercial offering in keeping with the surrounding spaces[9].

Joint Spatial Plan For The Greater Carlow Graiguecullen Urban Area, 2012-2018

The Joint Spatial Plan For The Greater Carlow Graiguecullen Urban Area (Joint Spatial Plan) initially ran for the period of 2012-2018 but was subsequently extended until November 2022.

The Joint Spatial Plan addresses the potential growth of the Greater Carlow Graiguecullen Urban Area in terms of construction, cultural, social and economic development. It offers a systematic framework for managing and governing spatial growth and land use. Its aim is to protect the distinctive and unique character of the Greater Urban Region, while at the same time promoting positive change and good development. It is concerned with steering growth so that it positively contributes to social, economic and environmental well-being, prioritising required improvements and identifying opportunities to improve the urban area of Greater Carlow Graiguecullen and the quality of life available.

A retail strategy was prepared in conjunction with the Joint Spatial Plan for the area examining how the greater Carlow Graiguecullen Urban Area is expected to perform in terms of development, settlement growth and retail provision within the strategic and statutory policy documents at the national, regional, county and sub-county levels. It identifies the development of retail as an important component of the local economy and notes that Carlow faces considerable competition from other towns and cities.

With regard to retail provision the retail strategy acknowledges that Carlow Town provides a good range of convenience and comparison shopping floorspace selling goods not found elsewhere within the County. It notes that given the rank and role of Carlow within the national, regional and county retail context it is important that the comparison retail offer is sustained and enhanced in order to compete with other similarly ranked centres. All types of retail floorspace are considered to be appropriate within Carlow Town, particularly centrally located comparison floorspace.

The retail strategy sets out a number of policies relating to Carlow County, Carlow Town Centre and the Carlow/ Graiguecullen Environs Area. Of particular relevance are those set out opposite:

Retail Policies:

- ECN P1: Ensure retail proposals are determined having regard to the Joint Retail Hierarchy included in this Plan, the Joint Retail Policy Document and the Retail Planning Guidelines 2005 or as amended and do not undermine or erode the vitality or vibrancy of Carlow Town Centre
- ECN P12: Support the retail primacy of Carlow Town Centre within the Greater Carlow Graiguecullen Urban Area and County Carlow and the focus for comparison retail development in accordance with the Retail Strategy and Retail Planning Guidelines 2005 or as amended
- ECN-P13: Provide for the development of an appropriate quantum and type of retail uses at district centres and neighbourhood centres in accordance with the Joint Retail Hierarchy and Retail Strategy and Retail Planning Guidelines 2005 or as amended; Dependent upon clear demonstration that there will be no impact on the integrity of a Natura 2000 site in accordance with Article 6 of the Habitats Directive or significant adverse effects on other environmental receptors
- ECN P14: Facilitate the take-up of purpose-built retail warehousing units for the sale of bulky goods in appropriate locations

As part of the Joint Retail Hierarchy the Central Retail Area is defined, followed by the rest of the Town Centre at the top of the hierarchy, followed by the Sleaty District Centre and Sandhills District Centre, and then by smaller community centres.

Graiguecullen has strong functional ties with Carlow Town, within the town centre, the historic Graiguecullen Village functioning as an urban quarter and the remaining as a suburb of Carlow Town. Graiguecullen is also served by the Sleaty District Centre, accessible from Sleaty Road and the small Castlecomer Road neighbourhood centre, offering local retail and commercial services.

In addition to the overall policies on retail, the Joint Spatial Strategy also contains objectives and policies relating to Carlow County and Carlow Town Centre as well as referencing policies from the Graiguecullen Local Area Plan.

Carlow Town Objectives:

- CTO1:Consolidate the built form of Carlow Town
- CTO2: Reinforce the quantum and diversity of uses within Carlow Town Centre
- CTO3: Advance and market the concept of the Cultural Quarter
- CTO4: Promote the development of the River Quarter and Riverside Regeneration
- CTO5: Encourage specific urban renewal projects and advance opportunity sites
- CTO6: Seek to establish Graiguecullen Village as an identifiable urban quarter within Carlow Town

Carlow town policies relating to retail:

- CT P5: Encourage the provision of a wide range of shopping, commercial, community, civic, tourism, amenity and transport services within Carlow Town Centre
- CT P6: Direct high-order commercial, civic and tourism services to town centre locations
- CT P7: Apply the recommendations of the Joint Retail Policy Statement along with relevant Retail Strategies, the Joint Retail Hierarchy and the Retail Planning Guidelines 2005 or as amended to safeguard and strengthen the vitality and vibrancy of the town centre
- CT P8: Support the full occupation of newly developed, purpose-built building stock in the town centre including office space, retail space and apartment units
- CT P9: Encourage the use of upper storeys of commercial buildings as dwelling units within the town centre in order to enhance passive surveillance of the town centre and deter anti-social behaviour
- CT P10: Restrict the use of ground floor space within the traditional commercial core for gaming uses or snooker halls, directing such uses to upper storeys and away from the main shopping streets

Graiguecullen Local Area Plan policies:

- GL P4: Encourage the full use of vacant or under-used commercial and retail warehousing space at Doyles of the Shamrock and on the Sleaty Road
- GL P5: Encourage economic development opportunities using opportunity site briefs prepared for the Glanbia Site, Sleaty Road District Centre and related Retail Warehousing and Barrowside Business Park

Local Economic and Community Plan, 2016-2021

The Local Economic and Community Plan contains the following high-level goals which are of note:

- Build thriving, resilient, sustainable and inclusive communities
- Strengthen and promote a thriving and sustainable enterprise culture in County Carlow
- Ensure access to education and skills for all members of communities
- Optimise the tourism product and message
- Provide the required infrastructure for the County
- Maximise external investment into Carlow

Tullow Local Area Plan, 2017 - 2023

Tullow is the main retail centre for the east of County Carlow and serves an extensive retail catchment area that includes adjoining areas in County Wicklow. The Town Centre comprises the main retail core and accommodates the majority of shops, professional services, retail services, bars and restaurants. Tullow offers a good range of convenience retail multiples, however, there is scope for the improvement and expansion of retail facilities, particularly comparison retail, in the Town Centre core, which would reinforce the role and function of Tullow as a service centre.

The LAP states that the Town has a relatively strong representation in terms of convenience stores, accommodating national / international multiples such as Tesco, Supervalu, Lidl and Aldi. These together with smaller conveniences throughout the Town cater for the convenience shopping needs of the local population. Additionally, there are some retail warehousing selling primarily bulky goods on the outskirts of Town. The LAP recognises that there is a need to recapture the market share through a variety of policies and initiatives to support the Town Centre, achieved by providing for a variety of retail floor space without compromising the integrity of the Town Centre.

The LAP sets out 12 policies relating to the retail development in accordance with the CDP, with the following of particular note:

- EC 15: To protect and strengthen the retail primacy of Tullow within the County and more specifically within Eastern Carlow.
- EC 23: To discourage non retail and excessive lower grade retail uses, such as, takeaway's and betting offices in the core retail area and other principal streets in the town centre, in the interests of maintaining and sustaining the retail attraction of the town centre.
- EC 24: To improve the public realm and support boutique style retailing in the town centre.
- EC 25: To secure the continued consolidation of Tullow Town Centre through progressing the regeneration of backland and brown field areas in the town centre.

The LAP also seeks to continue to develop the retail environment, the quality of the public realm, the range of retail uses and to facilitate complementary uses to retail (ECO 4) as well as promotes the range of specialist shops within the town core, which will contribute to the character of the Town and attractiveness of the area as a destination for shopping (Objective ECO 5).

The LAP specifically identified 2 no. opportunity sites which are located within the Town Centre, with the Mill Street Car Park noted as having the potential to deliver additional retail development that would complement and improve existing services in the town.

Muine Bheag (Bagenalstown) / Royal Oak Local Area Plan, 2017-2023

Muine Bheag (Bagenalstown) is a significant market town serving a large rural hinterland. Multiple representation is limited to a few small symbol stores and a Supervalu and Aldi store, with a number of independents while it is recognised that there is a lack of comparison goods provision within the Town.

The creation of a successful mixed-use viable Town Centre is a key priority for the LAP which recognises that there is a need to recapture market share. Specifically it states that there is an opportunity to expand both comparison retailing and the neighbourhood convenience role of the Town.

In addition the LAP recognises that there are opportunities to develop further niche retail and service facilities within the Town.

The LAP sets out 12 policies relating to the retail development in accordance with the CDP, with the following of particular note:

- EC 17: To sustain the vitality and viability of the main shopping area and to encourage measures to improve its attractiveness.
- EC 22: To discourage non retail and excessive lower grade retail uses, such as, take-away's and betting offices in the core retail area and other principal streets in the town centre, in the interests of maintaining and sustaining the retail attraction of the town centre.
- EC 24: To secure the continued consolidation of Muine Bheag Town Centre through progressing the regeneration of backland and brown field areas in the town centre.

The LAP also promotes the range of specialist shops within the town core, which will contribute to the character of the Town and attractiveness of the area as a destination for shopping (Objective ECO 4) as well as addressing the issue of brownfield / derelict / vacant / underutilised sites. With regard to the latter, this is subject to Objective ECO 6 of the LAP.

The LAP identified 4 no. opportunity sites, two of which are located within the Town Core and are identified as suitable or retail development. The Greenfield Site Royal Oak Road is identified as being suitable for an appropriately scaled neighbourhood convenience development while the edge of centre site at Kilcarrig Bridge is stated as being appropriate for convenience expansion and other appropriate town centre uses.

Town and Village Health Checks, 2017

This document addressed the Towns of Tullow, Muine Bheag / Royal Oak, Borris, Leighlinbridge, Hacketstown, Myshall and Rathvilly. It provides up-to-date information on the performance of each settlement, incorporating an assessment of strengths, challenges and opportunities which will inform the preparation for future development and enhancement of each settlement. The data gathered as part of the Study will support future community and socio-economic planning and development of each of the settlements assessed, with a view to enhancing their prosperity and vitality.

Each settlement was addressed in turn under the following headings:

- Accessibility and Connectivity
- Demographic and Socio-economic Characteristics
- Settlement Environment
- Economic Commentary
- Services and Facilities
- Natural Environment and Built
- Heritage
- Tourism and Recreation
- SWOT Analysis

Based on the findings of the above analysis the Study makes recommendations for each settlement across the following seven core themes:

1. Public Realm Improvements
2. Traffic Management Enhancements
3. Promotion of Local Skills, Produce and Enterprise
4. Recreation and Amenities Enhancement
5. Community Development and Engagement
6. Tourism, Culture and Heritage Development
7. Branding and Marketing

Each recommendation has an associated coordinator and time frame assigned to its delivery.

The findings from this Health Check have been reviewed and directly inform the update of the Health Check Assessment contained in Section 5 of this Strategy.

Muine Bheag (Bagenalstown) / Royal Oak Town and Village Key Project Plan, 2018

The Town & Village Key Project Plan was prepared in accordance with the guidance in the publication '*A Framework for Town Centre Renewal*' from the Retail and Town Centre Renewal Working Group for the Retail Consultation Forum, 2017.

The Plan includes an assessment of the characteristics of the Town, with the findings informing a number of recommendations for the Town as well as the formulation of key projects for town renewal.

With regard to retail, the Plan notes that there is a predominance of retail operations in the Town Centre area along with a strong retail presence along the main road / junction for Royal Oak. However, the location of retail in Muine Bheag Town Centre is not particularly focused to one main street, with a 'sprawl' of retail around a group of streets in the centre. The Plan states that this may be hindering the ability of the Town Centre to clearly define itself and provide a sense of place. In addition, the Plan notes that the vacancy rates indicate that the Town Centre is struggling, with a vacancy rate for commercial and mixed commercial/residential use that is twice that experienced in Country Carlow as a whole.

The Plan makes a number of recommendations in relation to 'retail and hospitality' but no direct recommendations on addressing the identified issues with retailing in the Town. Recommendations focus on upgrading the street-environs of the Centre to improve its attractiveness and increase the appeal of the Town and states that the importance is in finding complementary uses that can diversify a retail/hospitality offering and maximise custom as a result. It also recommends a new website for the Town.

Tullow Town and Village Key Project Plan, 2018

The Town & Village Key Project Plan was prepared in accordance with the guidance in the publication '*A Framework for Town Centre Renewal*' from the Retail and Town Centre Renewal Working Group for the Retail Consultation Forum, 2017. The Plan includes an assessment of the characteristics of the Town, with the findings informing a number of recommendations for the Town as well as the formulation of key projects for town renewal.

The Plan states that Tullow is a growing district town that has experienced rapid growth in a short period, with much of the recent development taking place on the periphery of the Town. With regard to the Town Centre the Plan notes that it has experienced some recovery since the post economic downturn, with a take-up in the occupation of vacant units by new businesses but that the continued presence of vacant units in and around the centre remains a challenge.

Specifically in relation to retail, the Plan states that there is a predominance of retail operations in the Town Centre along the main thoroughfare and while there is some retail presence outside of this the strong retail presence in the Town Centre ensures Tullow has the traditional 'high street' character of a small town which contributes towards the vibrancy of the Town Centre. However, vacancy rates indicate that there are issues, with Tullow experiencing twice the vacancy rate for premises in commercial and commercial/residential use than that in Carlow County as a whole. Those businesses that are surviving in the town centre have done so through diversifying their offering to maximise customer attraction. The Plan states that these shops survive despite a lack of footfall and this survival is fragile in the face of rising business rates and overheads.

The Plan makes a number of recommendations in relation to 'retail and hospitality' including *inter alia*:

- Business Support Scheme
- Tullow Gift Card scheme
- Website development

Other recommendations focus on improving the public realm and accessibility of the Town. The Plan states that an attractive and appealing retail/hospitality mix within the Town Centre is essential to its success and support should be provided to businesses to assist in their success. Works to improve the appearance of vacant premises will also improve the town environment for all businesses.

Draft Joint Local Area Plan for Graiguenamanagh-Tinnahinch 2021-2027

The Graiguenamanagh Local Area Plan, 2009-2015 was produced by Kilkenny County Council and was subsequently extended until 15th February 2020. It has thus now expired.

Carlow County Council in partnership with Kilkenny County Council have prepared a Draft Joint Local Area Plan for Graiguenamanagh-Tinnahinch (Draft Joint LAP). It sets out an overall strategy for the proper planning and sustainable development of both settlements in the context of the Kilkenny County Development Plan, 2014-2020, the Carlow County Development Plan, 2015-2021 and the RSES for the Southern Region.

While the Draft Joint LAP has no statutory standing until its adoption as it is part of the suite of forward planning documents relating to Carlow County it is referenced in this Retail Strategy for the purposes of completeness.

The town centre of Graiguenamanagh-Tinnahinch extends between both Graiguenamanagh and Tinnahinch, linked via the George Semple Bridge. Graiguenamanagh has evolved since the early 12th century and remains the focus for a broad range of commercial and community activities while Tinnahinch is a relatively new settlement with the exception of the area associated with the use of the River Barrow and main approach roads. Recent town renewal activity has given a welcome vibrant core to the Town Centre.

This Draft Joint LAP support the primacy of the Town Centre as the focus for future retail and commercial activity and seeks to attract activity back to the core area. In order to reinforce the Town Centre as a viable and vibrant centre, a mix of retail and commercial, civic, social and cultural uses is encouraged in addition to residential development. The continued focus on prioritising the Town Centre for all retail and appropriate commercial activity, with enhanced connectivity between Graiguenamanagh and Tinnahinch through enhanced pedestrian linkages is encouraged. The Draft Joint LAP identifies a number of regeneration opportunities within the Plan area that would greatly enhance the appearance and vitality of the settlement.

When considering proposals for retail, the Planning Authority will:

- Require a sequential approach to the provision of new retail facilities i.e. new retail facilities will be required to locate on lands zoned for mixed uses through the redevelopment and/or reuse of existing vacant premises where appropriate.
- Restrict internal retail leakage from the main core area of the settlement

Retail Objective:

"REO1.1: To promote the town centre for retail development and restrict further significant retail development (convenience and comparison) outside of the lands zoned 'Mixed Use' within the Plan."

The Draft Joint LAP states that notwithstanding the sequential approach, where the Planning Authority considers that the proposed development, by virtue of its nature and/or proposed location, will undermine the vibrancy or vitality of the Town Centre, such development shall be refused in accordance with the Retail Planning Guidelines.

Having regard to the effects of the Covid-19 andemic the Draft Joint LAP states that Kilkenny and Carlow County Councils are aware the function of the Town Centre we know it may no longer be viable for some retailers as we know that retailers will no longer be viable and are willing to consider alternative functions for it and the way in which businesses operate to ensure their vitality and viability.

Objective:

"TO2.4: To facilitate tourism activities such as waterways activities, eco-tourism, niche retailing, food markets, local and other craft type activities so as to diversify the tourism product in Graiguenamanagh-Tinnahinch, subject to relevant environmental assessments."

Economic Context & Retail Trends

3

Economic & Retail Context

Economic Overview

In December 2020 , the Economic and Social Research Institute (ESRI) highlighted a recovery in the second half of 2020 resulting in an anticipated growth in Gross Domestic Product (GDP) of 3.4% for the year. The aforementioned growth, driven by a significant recovery in Q3, occurred despite record unemployment, with predications for 2021 envisaging the economy growing by 4.9%[10].

As outlined above, 2020 witnessed high levels of unemployment with the ESRI identifying an unemployment level of 14.7% in September 2020 which represented a notable increase from 4.9% in February 2020[11].

The fact the that the economy experienced growth with high unemployment figures prevalent, highlights the considerable difference across the economy in terms of impact with sectors such as retail, the arts, culture, accommodation and hospitality suffering the most.

ESRI - Quarterly Economic Commentary, Winter 2020

The ESRI predicts that following lockdown restrictions in Q1 2021 and a vaccine rollout to the general population by Q3 2021, that economic activity should return to normal in the second half of the year. The unemployment rate is still expected to average 15% however, and as noted earlier GDP is projected to increase by 4.9% over the year[12].

While the Government restrictions imposed in Q4 2020 will limit the recovery in consumption, it is not expected to be as severe as the first lockdown period in 2020 which resulted in the highest fall in consumption across households in Ireland. The report highlights how following an effective vaccine programme in 2021 a recovery can be expected in the level of household consumption where savings have been built up[13].

Looking back over 2020 and focusing on retail, the report highlights how the peaks and troughs in retail sales give some insight into the differing trends in 2020 during periods of lockdown, opening up and more restrictions. The non-food retail sector declined significantly in April and May 2020 with Department Store trade down by -78% in May 2020 but experienced more favourable results in September with a +6% increase.

Retail sale of food followed a trend of:

- A high of 18% in March 2020 with the onset of restrictions and increased numbers of people working from homes.
- A low of 10% during July 2020 and August 2020 when restrictions were lifted, employees returned to the workplace, the tourist industry reopened and people increasingly dined out.
- An increase in October 2020 to 16% with the onset of new restrictions and the end of the holiday season.

Taking into consideration the above the report states:

> "It is clear that while the recovery was broad based, the changing composition of the more recent restrictions has ensured that the drop-off in consumption in October was not as extreme. This may also be due to the increased ability of both households and firms to adapt to the restrictions in addition to the more targeted measures for sectoral closures"

On the price side the Consumer Price Index (CPI) witnessed an average year-on-year change of -0.2% for the first 10 months of 2020. This result is quite favourable considering the concerns at the onset of the Pandemic over possibly supply side issues and reduced consumer demand.

Further to the above, a downward inflation trend occurred concurrently with the Pandemic with -1.5% reported in October 2020. The reduction was mainly attributable to energy, transport, housing and utilities which suggests that the impact on CPI was due to shocks on the supply side.

In a retail context it is noteworthy that the Report identifies issues in relation to forecasting how spending and consumption patterns will evolve going forward as households become more adaptable and increasingly use purchasing methods such as online and click and collect.

Central Statistics Office - Retail Sales Index November 2019 & 2020

The Central Statistics Office (CSO) releases a monthly Retail Sales Index comparing sales figures month on month. The latest figures available indicate that the volume of retail sales in Ireland decreased by 12.8% in November 2020 when compared to October 2020 on a seasonally adjusted basis.

On an annual basis, retail volumes were 4.7% lower in November 2020 compared with November 2019[14]. This impact can be largely attributed to the Level 5 lockdown restrictions which were in place during that time which has affected physical retailing.

When Motor Trades are excluded, the volume of retail sales decreased by 12.0% in November 2020 over the previous month and decreased by 3.3% when compared with November 2019[15].

The proportion of retail sales transacted online (from Irish registered companies) increased to 12.3% in November from 6.0% in October. This is below the high of 15.3% recorded in April at the height of the first Pandemic lockdown[16].

The CSO notes that the retail sales figures which have been produced since March 2020 have been an exception to existing seasonal patterns given the current ongoing Pandemic[17].

Overall, it is clear that based on corresponding figures between 2019 and 2020 over the same period, retail sales have been significantly affected as a result of the Covid-19 Pandemic.

Current Retail Challenges

The retail sector was facing into issues prior to the 2020 Pandemic in terms of challenges that were long term and structural. Covid-19 and the lockdown measures put in place have exacerbated retail woes many times over, put existential pressure on a number of businesses and further accelerated the shift to online that was already driving a long term reduction in the demand for retail space.

In addition to the above, the situation in Ireland has been exacerbated by Brexit which has resulted in operational issues for many bricks and mortar retailers while also complicating online ordering with confusion in early 2021 around taxes.

Covid-19

The nature of retail is changing both in Ireland and internationally and much of this change has been accelerated due to the Covid-19 Pandemic. While the trend of online retailing had been gaining pace over the years, the transition for a number of retailers before the Pandemic was not quite as swift. Since the Pandemic however, the number of retailers with an online presence doubled since its penetration into the market over 20 years ago[18].

In terms of reacting to restrictions imposed under the Government of Ireland's 'Living with Covid-19' Plan, it has become increasingly important for retailers to build an online presence and break into that market if they do not already trade online. Where this is not always possible, physical retailers will need to offer consumers new reasons to purchase offline and provide a safe environment to shop under Government regulations[19].

An emphasis has been placed on buying local to support Irish owned retailers and this campaign has helped to keep many businesses afloat during the Pandemic. This was especially important during the November and December sales periods in the lead up to Christmas whereby delays in delivery times for comparison retail products coming from outside of Ireland meant that many consumers began to purchase goods from their local retailer under the relaxation of physical retailing restrictions.

"Socialising at home or someone else's home is still the preferred option for 36% of consumers, while connecting virtually with friends remains a high priority for 33% of consumers and is a trend that's consistent across all age groups[25]".

However, under Government advice it is only recommended to go to public places for essential reasons such as buying groceries, exercise, and attending medical appointments. This has ultimately affected the level of retailing that has taken place online as a result of Covid-19. Individual's personal situations and behaviours towards going out in public are affected thereby reducing the number of those comfortable to engage in physical retailing[20]. According to a European survey conducted by Accenture in June 2020, consumers are beginning to shop more locally and mindfully by utilising locally sourced products from within their own neighbourhoods. The Report highlights 56% percent of consumers are shopping in neighbourhood stores or buying more locally sourced products, with 79% and 84% respectively planning to continue with this behaviour into the longer term[21].

Brexit

A timely trade deal was agreed between the European Union and Great Britain in December 2020 ahead of their exit from the common market. Despite this agreement however, there have been early signs of negative impacts in January 2021 which have affected stock levels and prices of goods as retailers in Ireland and the UK begin to iron out these issues.

The retail supply chains have been affected, particularly by:

- An increased demand for industrial floorspace due to stockpiling, which is likely to prove more challenging for seasonal peak times[22].
- An increase in paperwork required to fulfil exports/imports which have been delaying the delivery of goods and services into and out of the UK[23].
- Additional tariffs and the costs associated with complying with new customs procedures, which businesses may not be able to pass on to customers[24].

With the UK no longer subject to the same regulation and controls as other European Union (EU) countries there are issues around:

- Limited visibility of suppliers, including suppliers of components, materials, spare parts and packaging.
- Service providers such as logistics companies and outsourced facilities management providers.
- Hidden risks and costs associated with the lack of visibility.

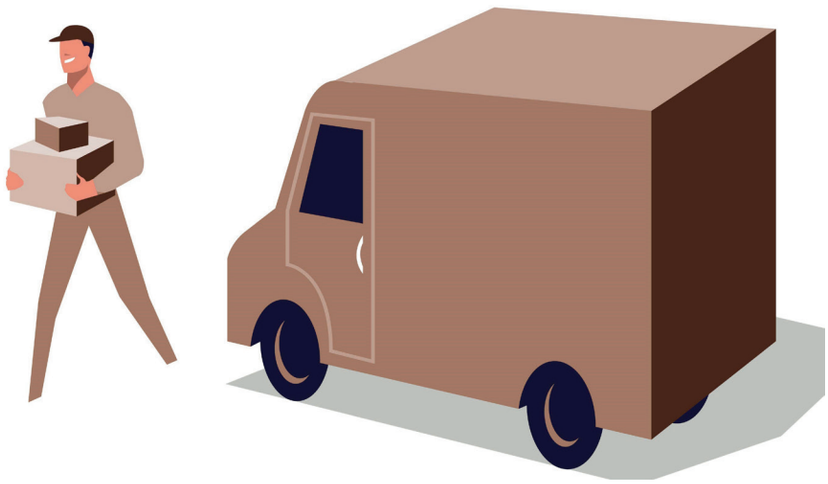
What now for Retail?

Even during the months of eased restrictions, the denser City and Towns Centres were hit by *inter alia* people's reluctance to use public transport, the desire to avoid congested places, a lack of tourism and workers staying at home. The same drivers have resulted in a number of suburban locations, regional towns and local main streets being relative beneficiaries.

People have spent more time closer to home, in turn benefiting the local economy with consumers shopping local for both essential and non-essential goods where the opportunity exists. Whilst the impact on dense business focused centres needs to be addressed, a potential shift to working more flexibly and closer to home is a welcome boost to some local main streets and regional towns and villages.

It is clear that the challenges of 2020 have sped-up changes in the retail sector that were happening anyway. Therefore, looking forward it is likely we will see a:

- Polarisation between the strongest performing centres and the rest with activity focused around re-purposing to protect retail assets, thereby bringing together services, retail, leisure as well as components of residential and co-working spaces in Retail Cores and Shopping Centres.
- Degree of support for local retailing on foot of changes to people's live work arrangements, albeit the shopping habits will change with the increased use of services such as click and collect.



Retail Trends & Initiatives

The purpose of this Section is to identify current and emerging trends and initiatives in the retail sector which may affect the retail environment over the lifetime of this Retail Strategy and beyond.

To more fully understand the role and influence of trends and initiatives, they will be reviewed in the context of three important facets of the overall retail environment being:

01. Internet Shopping
02. 'Bricks and Mortar' Retailing
03. Placemaking.

By taking this approach it allows for synergies and interdependences to be identified that will frame polices and objectives which seek to promote a greater integration of online platforms, physical shops and urban places.

In addition, as it is not appropriate to carry out surveys during the current lockdown, the trends and initiatives will be applied to the previous Household Survey. This will allow for conclusions to be drawn around how results may have changed from the previous Survey if it had been possible to carry out a survey as part of this review.

01. Internet Shopping

As highlighted in the section "Current Retail Challenges", Covid-19 has affected shopping patterns with consumers intensifying their use of online retailing as opposed to physical retailing for general comparison purchasing[26]. While convenience shopping continues to be dominated by in-person purchasing, due to the nature of the service being provided, the role of click and collect and home deliveries has increased.

The proportion of retail sales transacted online (from Irish registered companies) increased to 12.3% in November from 6.0% in October[27]. This is likely due to the Country moving to Level 5 Restrictions for a six week period from late October to early December 2020.

The Pandemic increased last year's rising share of e-commerce revenue in historical numbers. However, as more shoppers became dependent on internet purchases, the volume of orders along with the shortage of delivery staff left retailers and postal services unable to satisfy the demand. In addition, website failures, late orders and expired coupon codes reflected poorly on distributors, leaving consumers disappointed[28].

02. 'Bricks and Mortar' Retailing

The future role and form of 'Bricks and Mortar' retailing was already in transition prior to Covid-19 but the Pandemic has accelerated the process. The pace at which change occurred through 2020, with store openings and social distancing steps restricting store capacity, meant that it was not possible for retailers to adapt in a gradual fashion. Unfortunately, as a result many bricks-and-mortar retailers have permanently closed doors due to the trading restrictions and online competition.

In between the lockdown periods of 2020 as shops reopened, the big blow to businesses that came from the Pandemic's forced shutdown of stores last spring diminished considerably over the year, but long-term improvements to the retail environment are now required. The trend in retailing both in Ireland and abroad is the move from traditional retailing methods to more dynamic processes and it is this approach which this Strategy seeks to capture to guide a viable future for retailing in Carlow Town.

There is a requirement for a broad based approach to ensuring viability and recent challenges have led to an unparalleled degree of collaboration between landlords and their retail tenants, which may provide flexibility for retailers to accommodate consumers anywhere they could be in their ideal locations[29].

03. Placemaking

A central tenet of good urban planing is Placemaking, which is recognised as crucial to retailing going forward. The viability of retail stores in the future will be heavily reliant on being located in a quality urban setting with an experience which attracts consumers. This is a shift away from 'introverted shopping malls' with no mix of uses to more dynamic urban environments with a variety of uses and activities to attract consumers and increase dwell time.

Further to the above, a trend which is changing the face of retail both in Ireland and abroad is the concept of 'Experiential Retailing' (see below). This phenomenon, which seeks to create a unique experience for the customer in many ways, not only enhances the viability of retail stores but potentially can align with wider placemaking plans and strategies.

It is now more than ever recognised that retailing is an experience, and not a solitary one, as it can be combined with other services such as entertainment and food and drink. Strengthening the identity of places, and providing the rationale for investment in activation processes and the creation of programmable spaces within the scope of new developments is key to the delivery of a high quality experience to consumers[30].

Five areas of consideration that help establish an experiential retail and placemaking experience include:

- Leisure
- Technology
- Sustainability
- Well-being
- Vertical Retail and Planning

"Placemaking success is about people, making them feel something different and it is something that draws them to the place and keeps them in a place[31]."

Current Retail Trends

There are many retail trends and initiatives influencing both retailers and consumers, often seeking to embrace technology and create better experiences both virtually and in the physical retail environment. For the purposes of this study we have focused on five trends/initiatives which are currently of particular relevance to retail planning in terms of managing the existing offer and supporting long term vitality and viability. The trends/initiatives of focus are:

- Omnichannel Retailers
- Experiential Retailing
- Community Orientated Shopping
- Online Stores Needing Offline Spaces
- Grocery Fulfilment Strategies

Omnichannel Retailers

The nature of retailing has been changing for some time and an omnichannel approach is where retailers develop one strategy that is executed across all channels to create a connected, customer-focused experience. The benefits of such a strategy is that a consumer who starts by browsing on a brand's website will have the same experience whether they visit the brand's mobile app, social media accounts, or bricks-and-mortar store and whether they use a mobile phone, tablet, desktop computer, or laptop.

The purpose of adopting an omnichannel approach is to deal with two conflicting issues:

- Physical Stores – consumers like visiting stores but get frustrated if products are out of stock or if there are long queues at checkouts.
- Online – consumers like avoiding the need to travel and have access to a wide range of products. However, waiting for deliveries, the impersonal nature and dissatisfaction with a product when it does arrive causes frustration.

The omnichannel approach starts to deal with the above issues and is a consumer-focused strategy which aims to make shopping seamless be it in-store or online.

"E-Commerce Marketers Adopting an Omnichannel Strategy with Three or More Channels Are Seeing a 90% Higher Customer Retention Rate Than Those Who Are Not[32]".

The shift towards omnichannel and away from multichannel retailing has been happening for some time but the Covid-19 Pandemic in 2020 accelerated the trend. It has resulted in significant rises in 'buy online' and 'pick up in-store' orders which is a consumer habit that is expected to continue post the Pandemic.

The approach also benefits in-store purchases, particularly through the use of technology where shoppers can use touchscreens or mobile devices to order items that are out of stock or required in a different size, colour or style. It also encourages consumers to make the transaction in-store and avoids a situation whereby a consumer uses the store as a 'showroom' only to go online later and purchase from the cheapest website. There are also reports of certain retailers implementing strategies to achieve 'reverse showrooming' by using their digital platforms to encourage consumers to their physical stores with increased revenues achieved.

"Omnichannel customers spend 10% more on-line and 4% more in person than shoppers who use only a single channel[33]".

Experiential Retailing

As outlined in the previous sections, the concept of 'experiential retailing' has come to the fore where physical retailers want to distinguish themselves by providing a unique experience for consumers both in-store and in the surrounding area. Retailers use this opportunity to improve and strengthen relationships with the consumer which can also transcend to their online store if one is available.

"The best kind of experiential retail are the experiences that are repeatable—not one-off gimmicks, where you take an Instagram selfie and call it a day. Meaningful experiences are where you want to go back time after time after time because the service is great, or you have a relationship with the person who works there. Repeatable value that's different from your on-line experience[34]".

While the Pandemic has impacted on the development of retail experiences in-store it's still expected to be an important trend once normal trading resumes. The physical store will still need to distinguish itself from on-line retailers by providing unique in-store experiences which can vary depending on the retail offer but could include *inter alia*:

- Interactive Entertainment
- Exclusive Events for Customers
- Community-focused events
- Supporting charitable causes
- In-store co-branding initiatives
- Hands-on workshops
- Integrating Digital and Physical Experiences
- Augmented and Virtual Reality for Consumers

Community Orientated Shopping

The current Pandemic has vast numbers of people working from home, avoiding crowds and public transport. These changes to day-to-day living are encouraging people to shop and spend their leisure time in their community to the benefit of the local economy. This may be a temporary phenomenon, however, there are reasons to believe it might signal something more significant with:

- Employees seeking greater flexibility, with the concept of 'work near home' growing in popularity.
- The hyper-localisation of supply chains suggesting that local stores have a bigger role to play in omnichannel retail than many think.
- Environmental and welfare concerns coupled with wider societal awareness is influencing people to shop and travel more sustainably.
- Investment in 'active travel' infrastructure encouraging walking and cycling which increases engagement with local shops and businesses.
- Smart City initiatives helping connect urban areas in ways that allow efficient service delivery using a distributed rather than centralised model.

The retail environment is changing but community based retailing can be a growth area with the correct strategy that engages with the community, presents unique offerings/experiences, values the importance of personal contact and takes advantage of synergies. The potential exists for local and indigenous retailers and, depending on the context, more recognised brands may seek to embrace the idea of community oriented locations.

Online Stores Needing Offline Spaces

A key trend emerging in recent times is that of digitally native, direct-to-consumer brands who started online, now moving towards offline spaces to create a physical presence for consumers to shop. A lot of these brands have a focus on apparel due to the need to see/try the product and interact/avail of advices from a sales assistant. Its significant that Amazon, which has grown to be the largest online retailer in the world, are now starting to move into the convenience shopping market with physical stores, beginning in the United States and slowly moving towards Europe.

"We'll continue to see marketplaces and traditional retailers converge. It's happening both ways, where marketplaces like Amazon are moving to forms of traditional retail, and traditional retailers like Albertsons are making the move to marketplaces to stay relevant in the digital economy[35]".

It is difficult for retailers to bring the same level of retail experience and confidence in a product to the consumer from an on-line only presence. Despite the ongoing Pandemic, consumers prefer to physically engage with an item before purchasing to be sure that they get the right product and to avoid any hassle of returning which can cause delays.

In addition to the above, the push by many direct-to-consumer brands into physical retail is a means of lowering the cost of customer acquisition and driving higher order values. The problem being faced on-line is that of significant costs in advertising and getting 'one-up on the competition' which usually also requires heavily discounted products. This issue coupled with a lack of loyalty on-line means that while revenues can be quite high, achieving profitability with escalating advertisement cost is difficult.

While the Pandemic has helped the on-line only retailer in terms of lowering costs and increased revenues, it's likely that post-Pandemic the issues being experienced prior to 2020 will still exist. Therefore, in the years ahead there will be a further blurring of the line between on-line and off-line with direct-to-consumer retailers adopting traditional practices like opening stores and traditional retailers adopting the direct-to-consumer model.

As outlined above, one immediate impact of Covid-19 lockdowns was an unprecedented spike in on-line shopping. The emergence of new generations of retailers and consumers has put pressure on all aspects of the supply chain. It has also reignited debates around 'last mile' delivery and the implications of e-commerce for physical retail.

As we have seen in many other facets of life, the current Pandemic has intensified existing trends in the retail and logistics sector. Many consumers have been forced to shop on-line for essential goods, particularly food and groceries (often for the first time), forcing many supermarkets to ramp up their delivery capabilities. Retailers of all kinds, including local independents with little or no experience in on-line sales, have scrambled to adapt. The result is a 'Hyperlocal' phenomenon which is playing out in several ways:

- 'Dark' format stores are expanding with retail units used for back end order fulfilment designed for kerbside pickup or delivery, with no traditional 'front of house' consumer-facing aspect.
- Existing redundant/surplus retail space is being re-purposed to facilitate 'click and collect' models.
- Retailers are altering the 'front end' consumer facing element of the store for showroom or experiential space to complement traditional browse-and-buy activity.
- In-store staff, coupled with technology investments are being channelled into order picking and back of house fulfilment activities.
- Retailers who had limited previous on-line capability typically lack the infrastructure to fulfil internet orders and are having to piggyback on existing last-mile solutions (e.g. Justfetchit and Deliveroo).
- Especially for essential items, micro-fulfilment centres are being established to provide rapid stock replenishment to groups of stores, particularly in urban environments where

multiple outlets exist but in-store space for stock is limited.

While some of this activity may fade away as the impact of the Pandemic recedes, the explosion of experimentation with hyperlocal delivery methods will impact future thinking on local supply chains. Retailers looking to compete with major on-line players will need to remain focussed on constantly driving down costs and reducing fulfilment times.

This has significant implications for "bricks and mortar" retail, not all of which are negative. Physical retail is far from dead, but we are clearly seeing a continued rationalisation of space by retailers who were already overexposed in terms of physical footprint, as well as business failures where retailers have failed to adapt. Both processes have been accelerated by Covid-19, but they were already well established. More positively, the Pandemic has also stimulated the transformation of many retail businesses, within which physical stores still play a crucial role and have a demonstrable "halo effect" as part of an omnichannel strategy.

Traditional stores were always a combination of the retail and logistics functions; recent trends suggest a renewed recognition of this dual role. As surplus retail space becomes cheaper and more available, innovations around hyperlocal delivery will be a key part of re-imagining the future of retail.

Grocery Fulfilment Centres

A recent and interesting advancement in retailing is the idea of Grocery Fulfilment Centres which is a more seamless approach to e-commerce. The 'Brick and Mortar' retailers are beginning to invest in dedicated spaces, optimised for order picking efficiency, to shift rapidly to accommodate the growth in on-line ordering. The consumer typically demands same-day delivery, so convenience stores are expected to expand back-of-house areas to create more space for on-line order fulfilment. In addition, the growth has increased the demand for 'kerbside' pick up, resulting in space in parking areas being utilised for 'click and collect' services.

While this trend has resulted in growth in demand there are challenges around keeping on-line grocery shopping profitable due to factors such as delivery costs, labour for picking and capital investment in fulfilment facilities. In addition, an on-line consumer is less likely to shift away from their normal shop and therefore, are less likely to look at new brands, not influenced as much by packaging or point-of-sale material, and tend to avoid brands they don't normally purchase. Therefore, introducing new products and brands can be difficult through click and collect.

There is still a degree of trial and error in relation to Grocery Fulfilment Centres with the options varying from new dedicated automated distribution centres and repurposing space in existing regional distribution centres with automated facilities to in-store picking and delivery or in-store through 'micro-fulfilment Centres' (MFC). It would seem at this stage at least, the MFC might be the trend that most will follow as they:

- Leverage existing stores to increase on-line order fulfilment efficiency and enable same-day delivery.
- The 'last-mile' delivery cost is shifted to the consumer through the use of click and collect.
- They can be located inside an existing store or in a smaller storage space in an urban location.
- Automated picking means that MFCs can have a turnaround time of under an hour for an online order.

The shift to MFCs by convenience operators is typically happening by repurposing existing spaces within stores (e.g. back-of-house floorspace) or using perimeter space.

There is an upfront capital cost associated with transforming stores, but once established the costs are normal maintenance and upgrades. Therefore, as fulfilment centres are expected to be a growth area going forward, there is an expectation that retail spaces are going to undergo change.

Looking Forward

The retail industry is in the midst of a massive transformation driven by consumers use and retailers adoption of digital technologies, improvements in the experience and the need for new solutions for 'bricks and mortar' retail.

In order to set out a forward looking strategy there is a need to appreciate the areas where retail planning can focus to best support retailers. It is important to understand how the retailing trends will interact with the viability of 'bricks and mortar' retail, contribute to 'placemaking' and provide the opportunity for the on-line platforms to support main street retailers.

Figure 3.4 below seeks to identify the areas where interactions can be most influential and sets a framework to help establish policies and objects that embrace the changing retail environment.

It is clear that omnichannel is important across all facets of the retail environment which is not surprising as its success is grounded in delivering a unified experience.

Its anticipated that a focus on 'community oriented shopping' will support 'bricks and mortar' retailers while also significantly contributing to placemaking in the urban environment.

The emerging demand for floorspace from both on-line retailers and the grocery sector demonstrates the new links that are occurring between internet shopping and 'bricks and mortar' retailing. The results are interesting developments in areas such as 'fulfilment centres', last-mile delivery solutions and a physical presence for direct to consumer retailers.

The challenge for planning policy will be to ensure that these trends are managed so as to contribute to and support economic development while also making a positive impact in terms of the vitality and viability of town centres.

Many retailers are experimenting in terms of *inter alia* their operating model, scale, and offer. However, there is also a real focus on delivering on the retail experience in store and being part of the placemaking strategy for the urban environment.

The findings of this Section will be used to update previous surveys by applying, at a high level, the trends to understand how consumer habits may have changed from the last survey undertaken. In addition, the findings will set the basis of retail planning policy to ensure that the physical retail environment is supported and focused on town centre viability and vitality.

Trends	01. Internet Shopping	02. 'Bricks and Mortar' Retailing	03. Placemaking
Community Orientated Shopping	-	*	*
Omnichannel Retailers	*	*	*
Online Stores Needing Offline Spaces	*	*	-
Experiential Retailing	-	*	*
Grocery Fulfilment Centres	*	*	-

Figure 3.4: Categorisation of Retail Trends

Spotlight: Trading Online Voucher Scheme

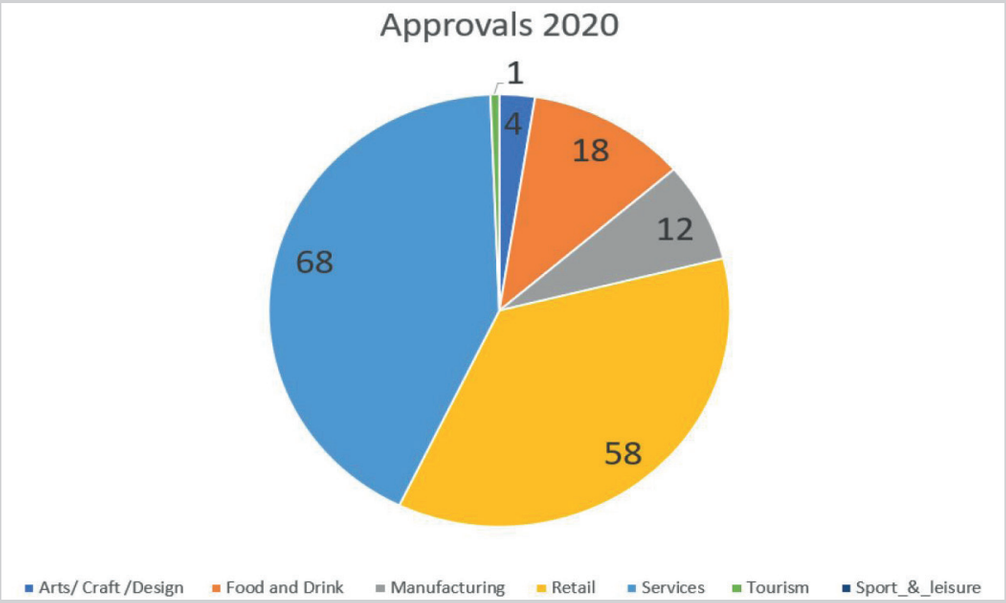
Last year across the Country, Local Enterprise Offices paid out in excess of 9,000 vouchers under the 'Trading Online Voucher Scheme'. This is more than seven times the amount given out last year.

The vouchers, designed to assist small businesses (up to 10 employees with turnover of less than €2m) who have either a limited or no e-commerce presence, offer financial assistance of up to €2,500 with co-funding of 10% from the business.

The funds can be used to set up an e-commerce site, develop a digital marketing strategy, add payment facilities to an existing site, develop an app for your customers and more. In 2020 there was 3,962 applications from the middle of March to early June.

Year	Approvals	Value of Approvals	Value of Draw Downs
2014	18	€ 38,077.00	€ 22,752.14
2015	29	€ 54,853.00	€ 34,681.36
2016	22	€ 38,057.00	€ 25,233.01
2017	12	€ 23,583.00	€ 22,797.50
2018	5	€ 7,600.00	€ 5,925.00
2019	7	€ 15,444.00	€ 11,580.00
2020	160	€ 364,735.00	€ 172,354.00
2021	30	€ 71,308.00	n/a

Figure 3.5: Value of Approvals and Draw Downs



Survey and Analysis

4

Introduction

This Retail Strategy updates the existing Retail Strategy for County Carlow, completed in 2015. In this regard it utilises the qualitative and quantitative data contained in that Strategy and updates this data utilising available, up-to-date information and statistics.

As highlighted previously, the current national lockdown due to the Covid-19 Pandemic has posed some challenges in relation to the review and updating of the retail floorspace survey, the health checks for the main centres and the commissioning of new household surveys. With on the ground survey work not practical or viable, both the update to the floorspace survey and the health checks have been carried out utilising primarily desktop research of a range of sources of information, available both publicly and from Carlow County Council and the Local Enterprise Office.

In relation to undertaking new household surveys, this was not considered appropriate in a temporarily restricted and altered retail environment as responses would not be an accurate representation of normal shopping patterns. Instead the 2015 Survey results were reviewed, as a more accurate reflection of shopping patterns, and the retail trends identified in Section 3 applied to these figures to update them. This innovative approach provides for an update of the Survey findings in line with the trends and changes that we know have, and are, occurring in the retail sector since 2015 while ensuring that the overall findings are not skewed by the current temporary retail market conditions on foot of the Covid-19 Pandemic.

A brief description of each of the surveys utilised is provided in this Section, along with details on the updating of these and the key survey results identified.

The following qualitative and quantitative surveys are updated as part of this Retail Strategy:

- The survey of the existing retail floorspace in Carlow Town, Tullow and Muine Bheag (Bagenalstown).
- The survey of vacant units in Carlow Town, Tullow and Muine Bheag (Bagenalstown).
- The 2015 Household Survey undertaken by Demographics Ireland.

Update of the Floorspace Survey

Approach

The previous Retail Strategy contained a detailed floorspace study of existing retail floorspace within Carlow Town, Muine Bheag (Bagenalstown) and Tullow undertaken in 2014. This information has been utilised as a base and updated for use in this Retail Strategy.

As non-essential retail was closed at the time of undertaking this Strategy it was not possible or viable to undertake site visits to retail premises. A desktop study of retail planning permissions granted and those operational since the 2014 analysis was undertaken along with a review of the Vision-Net Directory of all commercial limited companies in County Carlow. This established changes to the retail environment that were subject to planning consent as well as providing a list of retailers currently operating in County Carlow.

The Survey was updated to include not only any identified increases or changes to the retail provision but the type of retail business e.g. newsagent, clothing, bakery etc., the categorisation as to whether convenience, comparison or bulky goods in accordance with the guidance set out within the RPGs and the net retail floor area.

The floorspace figures for other settlements within the County contained in the previous Retail Strategy were also updated utilising the same approach.

Classification

Annex 1 of the RPGs includes a clear classification of the types of retail goods, providing a goods-based retail classification divided into convenience goods and comparison goods, with the latter containing the subcategory bulky goods. The floorspace survey categorised the different retail units within the County in accordance with the definitions as set out in the RPGs as follows:

Convenience

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

All supermarkets, smaller convenience stores and retail food outlets (excluding fast food takeaways, restaurants and cafés) were included in this category.

Comparison

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

Bulky Goods

While bulky goods are a form of comparison retail, it is considered appropriate to make a distinction within the Retail Strategy between pure comparison floorspace and bulky goods. Annex 1 of the RPGs includes a 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 flatpack furniture are of such size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that large floorspace would be required to display them e.g.
- Repair and maintenance materials;
- Furniture and furnishings;
- Carpets and other floor coverings;
- Household appliances;
- Tools and equipment for the house and garden;

- Bulky nursery furniture and equipment including perambulators;
- Bulky pet products such as kennels and aquariums;
- Audio-visual, photographic and information processing equipment;
- Catalogue shops and other bulky durables for recreation and leisure.

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

Net Retail Area

As is standard practice, for the purpose of this study, the floorareas relate to the net retail floorspace as defined in the RPGs (see opposite).

The quantum, format and location of retail floorspace in County Carlow, identified as part of the 2014 Survey, has been updated and is summarised in Figure 4.1.

Net retail floorspace - "The area within the shop or store which is visible to the public and to which the public has access including fitting rooms, checkouts, the area in front of checkouts, serving counters and the area behind used by serving staff, areas occupied by retail concessionaires, customer service areas, and internal lobbies in which goods are displayed, but excluding storage areas, circulation space to which the public does not have access to, cafes, and customer toilets[36]."

Location	Convenience 2021 Net (sq.m)	Non-Bulky Comparison 2021 Net (sq.m)	Bulky Comparison 2021 Net (sq.m)
Carlow Town	12,569	27,060	35,689
Muine Bheag	2,546	2,533	5,518
Tullow	3,835	1,640	4,731
Athy	5,620	4,864	-
Hacketstown	955	100	1,500
Carrickduff (Bunclody)	3,123	1,905	300
Tinnahinch (& Graiguenamanagh)	2,578	1,010	-
Baltinglass	1,500	1,500	-
Ballon	270	50	100
Borris	380	40	-
Leighlinbridge	170	340	1,200
Rathvilly	110	60	150
Other	533	105	-
Total	**34,189**	**41,227**	**49,189**

Figure 4.1: Existing Retail Floorspace

Update of the Vacancy Survey

Context

A survey of all vacant floorspace within Carlow Town, Muine Bheag (Bagenalstown) and Tullow was undertaken as part of the previous Retail Strategy in 2014. The approach to adopt in updating this information has been particularly challenging in the current climate with non-essential retail closed at present and the retail sector in a state of readjustment.

After such closure under the previous lockdowns some retailers did not reopen, some reopened reliant on the Christmas trade to determine if continuing to trade in 2021 was viable and some started utilising their premises as a base for their on-line business. With restrictive measures on the opening of non-essential retail still in place it is not possible at present to accurately determine the impacts the Covid-19 Pandemic may have had on the retail sector in Carlow in terms of vacancy.

In addition, and as discussed in Section 3, while the Pandemic and associated restriction have had a profound impact on retailing and the way people shop the previous cycles of restrictions and opening up have demonstrated that these changes are not likely to be permanent. On the last reopening of the economy shoppers demonstrated that they want to visit retailers for the experience and as a social outing. With regard to the latter the message of shop local has also resonated with shoppers, with more people choosing to stay local for their goods and services when they are open. In addition, many smaller retailers have availed of the Trading Online Voucher Scheme to set up an in-line retail presence, many of which are run from existing retail premisses. Therefore, the actual increase in vacancy attributable to the Covid-19 Pandemic may not be as severe as initially anticipated once the economy has time to recover and life returns to 'normal' on foot of mass vaccinations.

Approach

While the analysis undertaken in Section 3 is informative in understanding recent retail trends, the longer term impacts of the Covid-19 restrictions on the retail sector are unknown. It was thus determined that the most appropriate approach was to utilise the 2014 percentage vacancy figures contained in the previous Retail Strategy. These figures were attained on foot of a detailed floorspace survey, undertaken at a relatively stable time in the economy and retail sector, on foot of the recovery from the impacts of the recession. The vacancy percentages when applied to the updated floorspace survey, see Figure 4.1, are considered to represent standard levels of vacancy to be expected in County Carlow in normal trading conditions. As all available information indicates that the retail sector will bounce back, now supported by the mass vaccinations, utilising a relatively standard level of vacancy is considered a logical approach at this time.

Figure 4.2 applies the vacancy percentage findings of the 2014 survey within Carlow Town, Muine Bheag (Bagenalstown) and Tullow contained in the previous Retail Strategy to the updated floorspace survey. This provides an indication of the expected vacant floorspace levels in the main centres in County Carlow under normal trading conditions. In line with the approach adopted within the floorspace survey, vacancy levels are expressed as net retail areas. These figures are expressed in terms of a percentage of the overall floorspace.

Centre	Vacancy in the Context of Net Floorspace			
	Total Non-Vacant Retail Floorspace (sq.m. Net)	% Vacancy from the 2014 Survey	Estimated Vacant Retail Floorspace (sq.m. Net)	Total Retail Floorspace - Occupied and Estimated Vacant (sq.m. Net)
Carlow Town	75,318	40%	50,212	125,530
Muine Bheag	10,597	27.8%	4,080	14,677
Tullow	10,206	46%	8,694	18,900

Figure 4.2: Estimated Vacancy Levels within Carlow Town, Tullow and Bagenalstown

It is acknowledged that the above approach cannot provide as accurate a reflection of vacancy as an on the ground survey and in this regard it is noted that Carlow County Council are to commission a 'Land Use Map for Carlow Town Centre and develop a business case for the redevelopment of vacant units in Carlow Town Centre'. Part of this commission will include a detailed assessment of current vacancy within the Town in layers relevant to floors. In addition, Project Carlow 2040: A Vision for Regeneration sets out a regeneration strategy for the Town, the implementation of which should result in a decrease in retail vacancy levels in the medium to long term.

In order to check that the above approach is relatively sound and accurate the GeoView Commercial Reports on Commercial Property were reviewed for Q4 2014 in line with the undertaking of the previous vacancy survey and Q2 2020 as the most recently available Report. While it is acknowledged that 'commercial' is relatively broad in this context i.e. all non-residential address points are classified as commercial address points[37], the Reports indicate general trends in vacancy. It is noted, however, that County Carlow had and continues to have one of the lowest number of commercial address points.

As shown in Figure 4.3, the GeoView Commercial Reports for Q4 2014 and Q2 2020 show that while County Carlow had a slightly higher level of vacancy than the State across the broad 'commercial' category, it experienced a similar increase in vacancy over the subject period. Given the relatively limited increase in vacancy over the five and a half year period and the range of uses captured in the term 'commercial' it is considered that retail would only account for a small portion of this 0.8% change and therefore, it is considered appropriate to utilise the retail vacancy percentages from the previous vacancy study as these were based on on the ground research and detailed analysis.

In addition, the GeoView Commercial Reports for Q2 2020 also indicated that retail vacancy levels captured in the previous vacancy survey are largely reflected in the overall vacancy levels in the key Towns in Carlow. As shown in Figure 4.4, Muine Bheag has by far the greatest percentage vacancy of the three settlements both in terms of retail from the previous vacancy study and overall 'commercial' as per the GeoView Commercial Report. While there is some disparity between the retail and 'commercial' rates for Carlow Town and Tullow, as Carlow Town would have far more commercial premisses this may account for its higher 'commercial' vacancy.

	Vacancy Q4 2014	Vacancy Q2 2020	% Change Vacancy
National	12.8%	13.5%	+ 0.7%
County Carlow	13.1%	13.9%	+ 0.8%

Figure 4.3: GeoView Commercial Property Report - Overall Vacancy Q4 2014 and Q2 2020

	Vacancy Q2 2019	Vacancy Q2 2020	% Change
National	13.3%	13.5%	+ 0.2%
Carlow Town	18.3%	18.2%	- 0.1%
Muine Bheag	21.4%	21.7%	+0.3%
Tullow	14.9%	14.7%	- 0.2%

Figure 4.4: GeoView Commercial Property Report - Vacancy Town Level Q2 2019 and Q2 2020

Core Retail Area

As on the ground survey work was not practical or viable, it has not been possible to update the vacancy figure for the Core Retail Areas. However, having undertaken a review and update of the Health Checks contained in the previous Retail Strategy, see Section 5, as well as the Town and Village Health Checks undertaken in 2017 and the Town and Village Key Project Plans for Tullow and Muine Bheag (Bagenalstown) undertaken in 2018, it does not appear that there has been much change.

The exception may be the Penney's site in Carlow Town if permission is granted for the refurbishment of the existing store (Reg. Ref. 19/478, Board Ref. 307766) and it is reoccupied by the retailer. However, while this would result in one of the Opportunity Sites in the Core Retail Area having an active use again it is in fact a relocation of this use, as Penney's is currently trading from the Carlow Shopping Centre which will have to seek a new operator for that unit. While there is notable vacancy in the retail warehouse sector, see Section 7, given its nature such units are not generally located in the Core Retail Area.

Having regard to the above it is considered appropriate to utilise the percentage vacancy figures for the Core Retail Areas from the previous Retail Strategy which are as follows:

- Carlow Town 28%
- Muine Bheag 31.7%
- Tullow 18%

Again these figures largely align with the general trend identified in the GeoView Commercial Reports for Q2 2020, whereby Muine Bheag has the most vacancy by a substantial percentage.

Summary

The vacancy figures, as established under the previous Retail Strategy and applied to the updated floorspace survey, illustrate that vacancy levels vary significantly throughout the County. This is a finding which is upheld by the recent GeoView Commercial Reports on Commercial Property Q2 2020.

As with the previous Retail Strategy, and in line with the national aim to protect and enhance the vitality and viability of Town Centres, it is considered that the vacancy within the retail core, is the most important. In this regard there has been no notable changes in the key Towns, with figures from the GeoView Commercial Reports for Q2 2020 reflecting the significant challenges in this area.

The issue of vacancy is considered both within the quantitative assessment of this Retail Strategy as well as in the Health Check assessment of individual centres. While the 2014 study entailed a detailed survey to establish vacancy it is acknowledged that not all vacant floorspace is retail in nature. The 2014 vacancy figures identify all vacant units within a Town Centre, however, such units could potentially be accommodated by a range of retail and non-retail uses including financial, service and other town centre uses.

Update of the Household Survey

Context

As part of the previous Retail Strategy a household survey was undertaken by Demographics Ireland, an independent survey company, in March 2014, to establish the shopping patterns in County Carlow at that time for different retailing types including clothing, footwear, food and bulky household goods. The results of the survey are important in obtaining an understanding of the levels of retention and outflows of expenditure within the study area.

As discussed at the start of this Section, the undertaking of a new household surveys was not considered appropriate in a temporarily restricted and altered retail environment. With the population in a national lockdown, non-essential retail closed and those in high risk cohorts being ask to limit interactions, the responses received from such a survey at this point in time would not be an accurate representation of people's actual, 'normal', shopping patterns.

While shopping patterns relating to convenience retail are expected to have remained largely unchanged due to its essential nature, the current Pandemic has resulted in a 'new normal' shopping pattern in relation to comparison retail. This new pattern is heavily reliant on on-line shopping for the provision of non-essential items, directly attributable to the forced closure of this form of retail under current restrictions. However, based on the trends identified in Section 3 it is unlikely that these will continue, or at least to the same degree, once restrictions are eased/lifted and people can visit shops and experience the retail environment.

In addition, the recently finalised BREXIT has also impacted the retail environment with consumers unsure about fees and charges relating to goods purchased from the UK and some UK based companies withdrawing their on-line offer to the EU, either temporarily or permanently. As a result on-line sales are further skewed at present, from both 'normal' levels and 'new-normal' Pandemic levels.

Approach

As it is not appropriate to undertake a new Household Survey at this point in time, the 2014 Household Survey has been utilised as a base. This Survey was undertaken at a relatively stable time in the economy and retail sector, on foot of the recovery from the impacts of the recession, and therefore, its findings are considered to be representative of 'normal' shopping patterns.

In order to account for changes in the retail environment since 2014 the findings of the Survey have been updated in line with the retail trends identified in Section 3. This approach is considered an innovative way of accounting for the data that would be collected if it were possible to undertake a new Household Survey under normal circumstances.

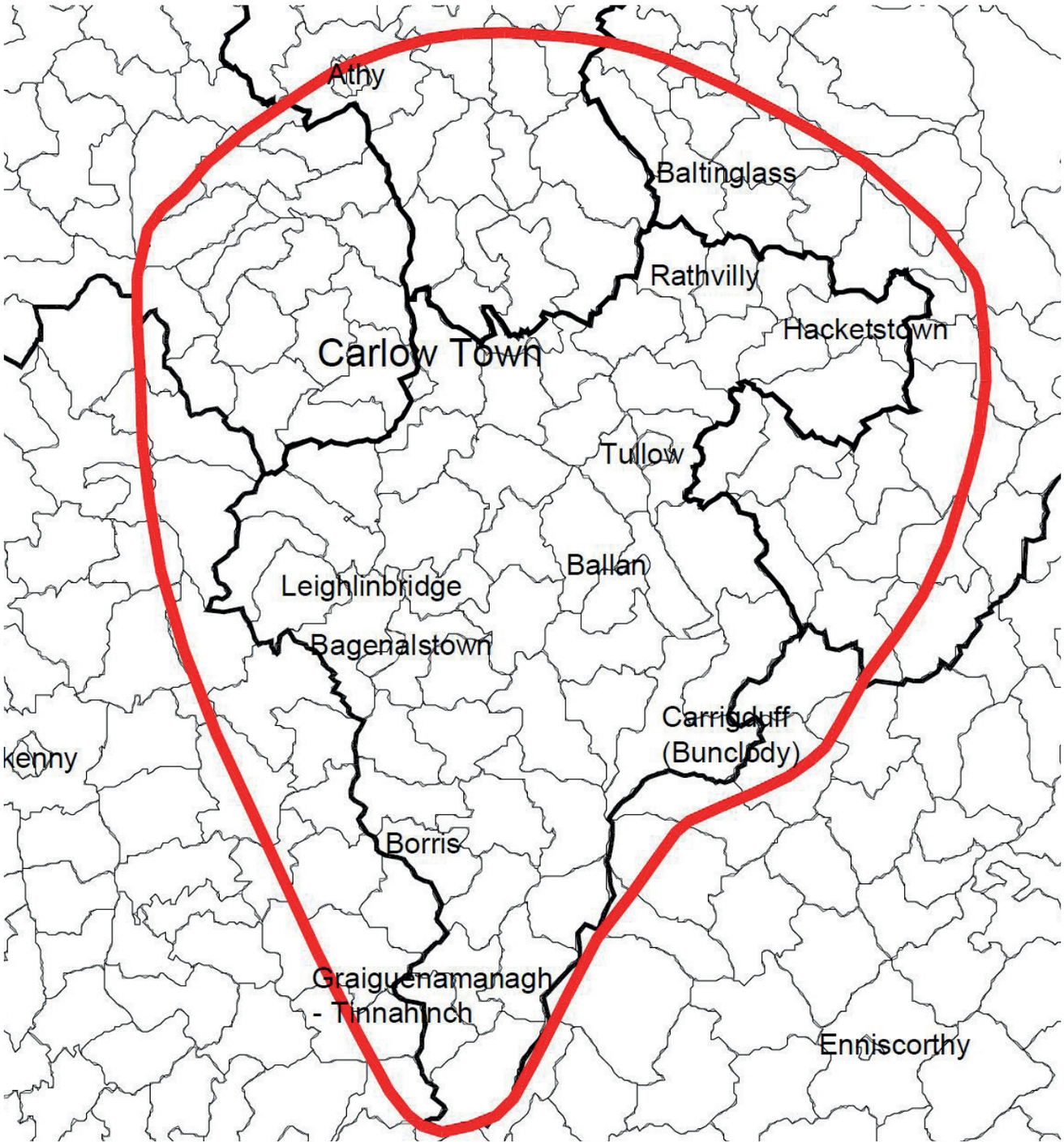
Survey Methodology

The Household Survey undertaken in 2014 was a comprehensive survey of households within the identified catchment area, the objective of which was to establish the existing shopping patterns within County Carlow.

The catchment area for the County was identified by Demographics Ireland based on drive time isochrones from the area. The catchment area was split into the following main areas:

- Area 1 - Carlow Co. Administrative Boundary split between Area 1A Carlow Town, Area 1B Carlow South: Bagenalstown, Area 1C: Carlow North East: Tullow
- Area 2: Co. Kildare
- Area 3: Co. Kilkenny
- Area 4: Co Laois, split between area 4A Graiguecullen and Area 48 rest of Co. Laois
- Area 5: Co. Wexford
- Area 6: Co. Wicklow

The catchment area utilised in the household survey is shown in Map 2.



Map 4.1: Catchment Area for 2014 Household Survey

As part of the 2014 Survey a total of 312 household surveys were undertaken. The number of questionnaires undertaken within each of the survey areas was determined based on pro-rata population split. The survey scheme was selected to give equal representation to households in each of the catchment areas.

Each drive-time segment was subdivided geographically to ensure the sample was proportionally represented within each band. Telephone calls were made meeting specified quotas within each subdivision using a randomisation sequence of landline telephone numbers.

The Household Survey primarily contained questions relating to where the respondents carry out their main food shopping, top up shopping, bulky household goods shopping and clothing and footwear shopping. The survey also included other useful information such as the mode of transport used for shopping trips, on-line shopping trends and the frequency of shopping trips to centres outside of Carlow County.

Updating the Survey Findings - Convenience Shopping

Convenience Shopping Trends - From Survey

As part of the 2014 Survey respondents were asked:

"Regarding your household food and grocery shopping, where do you go to normally carry out your main food and grocery shopping, or do you shop on the internet for your main food and grocery shop?".

Of the 297 respondents, 166 were from County Carlow (56%) with the remainder from outside the County. The detailed breakdown of respondents is as follows:

- **80 people (c. 27%) were from Carlow Town**
- **41 people (c. 14%) were from Muine Bheag**
- **45 people (c.15%) were from Tullow**
- **11 people (c. 4%) were from Graiguecullen**
- **43 people (c. 14%) were from Co. Kildare**
- **27 people (c. 9%) were from Co. Wicklow**
- **21 people (c. 7%) were from Co. Kilkenny**
- **20 people (c. 7%) were from Co. Laois**
- **9 people (3%) were from Co. Wexford**

Figure 4.5 lists where the respondents lived and where they did their principal convenience shopping within the catchment area. The response to this question illustrates the following:

- 98% of all respondents who live in County Carlow carry out their main food and grocery shopping in centres within the County.
- 94% of respondents from Carlow Town did their shop in Carlow Town/Graiguecullen Co. Carlow.
- Within the County, Carlow Town is the main location for convenience shopping with a market share of 57%. Tullow maintains a market share of 15% and Bagenalstown maintains a market share of 18% in relation to convenience retail.
- 75% of respondents within the Laois area of the catchment carry out their main food and grocery shopping within County Carlow.
- 89% of respondents within the Wexford area of the catchment undertake their main food shopping in Carlow. This inflow of convenience expenditure from Co. Wexford is primarily attributed to the Supervalu in Bunclody being located within the administrative boundary of County Carlow.

The Survey also demonstrated an expenditure inflow of 54% from the areas within the catchment area that are outside of County Carlow.

Convenience Shopping Trends - Update

Under normal trading conditions, pre Covid-19, it is expected that the Survey results would remain largely the same in terms of convenience shopping. In this regard people tend to do their regular convenience shopping in the Centre which is most convenient to them as demonstrated by Figure 4.5. The exception will be Carlow Town which will attract a degree of convenience shopping from outside its catchment due to its comparison retail offer and linked trips to same.

The survey findings are also expected to stay largely the same as none of the key centres within County Carlow have experienced notable improvements in their convenience offer since 2014. This may alter slightly in the future once Lidl has established a trading pattern in Muine Bheag. Based on the Survey 66% of the respondents from Muine Bheag carried out their regular convenience shopping in the Town thus there is scope to retain further convenience trade and Lidl should contribute to this.

	Where Respondents Shopped													
Where Respondent Lived (No. Respondents)	Carlow Town	Muine Bheag	Tullow	Hackett-stown	Ballon	Rathvilley	Borris	Graiguecullen (Co. Carlow)	Bunclody (Co. Carlow)	Co. Kildare	Co. Kilkenny	Co. Laois	Co. Wexford	Co. Wicklow
Carlow Town (80)	72	2	1	1	-	-	-	3	-	-	-	1	-	-
Muine Bheag (41)	8	27	2	-	-	-	1	-	-	-	1	-	1	1
Tullow (45)	15	1	22	5	1	1	-	-	-	-	-	-	-	-
Co. Kildare (43)	17	-	1	-	-	-	-	-	-	23	-	1	-	1
Co. Kilkenny (21)	4	6	1	-	-	-	-	-	-	-	9	-	1	-
Co. Laois (20)	15	-	-									5		
Graiguecullen (11)	5	-	-	-	-	-	-	-	-	-	-	6	-	-
Co. Wexford (9)	1	-	-	-	-	-	-	-	7	-	-	-	1	-
Co. Wicklow (27)	4	-	4	3	-	-	-	-	-	-	-	-	-	16
Total	**141**	**36**	**31**	**9**	**1**	**1**	**1**	**3**	**7**	**23**	**10**	**13**	**3**	**18**

Figure 4.5: Principal shopping locations used for convenience shopping within the catchment area

On-Line Shopping - From Survey

The Survey also attained information in relation to on-line shopping trends within the catchment area.

Respondents were asked if they carry out their main food and grocery shopping on line.

The response demonstrated that only 3.2% of all respondents carry out their main food and grocery shopping on-line.

On-Line Shopping - Update

The market share of on-line shopping was already increasing pre Covid-19, however, this was primarily in the area of comparison shopping. The Covid-19 Pandemic has accelerated this trend across the market, with a notable increase in convenience home-deliveries during the initial phase of the Pandemic.

However, as convenience retailers are essential they have remained open throughout. In addition they have adopted measures in-store to prevent the spread of the virus and have designated shopping times for the elderly and vulnerable. Such measures in combination with relatively restricted home delivery services would indicate that while there may be an increase in on-line convenience shopping this would be marginal. Where home deliveries are available, delivery restrictions mean that consumers are likely to be purchasing from the same stores, or another store within the same settlement, as they would have visited for their convenience shop.

In the future it is expected that the roll-out of Grocery Fulfilment Centres, as discussed in Section 3, will impact how people do their convenience shop. However, as these will likely be located at existing stores, the trade distribution between centres is likely to be unchanged by these as people can still 'shop' at their usual store just without having to go in-store. Some redistribution may occur depending on how successful this new trend is and the range of convenience retailers that adopt it. It may have the potential to increase convenience trade draw from other centres to Carlow Town as it would make picking up a convenience shop as part of a linked trip even easier.

Main Reason for Shopping at Grocery Shopping Location - From Survey

As part of the Survey respondents were asked to state their main reason for shopping at the store/ location where they carry out their main food and grocery shopping. The results are illustrated in Figure 4.6.

As stated previously, "proximity to home" is the main determinant in choosing a convenience shopping location, with 47% of all respondents citing this. Other key determinants include "good value for money" (25%), "good quality products" (7%), "wide choice of goods" (5%) and "ease of parking" (5%).

Main Reason	Total Catchment Area	Total Co. Carlow
Total	312	177
Close to Home	47%	47%
Good Value for Money	25%	24%
Good Quality Products	7%	7%
Ease of Parking	5%	5%
Wide Choice of Goods	5%	3%
Parking cheap/free	2%	3%
Close to Work	2%	2%
Close to Other Shops	1%	2%
Other	6%	6%

Figure 4.6: Main Reason for shopping at main food grocery store location

Main Reason for Shopping at Grocery Shopping Location - Update

As convenience has always been a key consideration in choosing where to undertake main food grocery shopping this is not expected to have altered significantly since the Survey was undertaken.

However, during Covid-19, notwithstanding restrictions on movement, people were encouraged to stay local and this initiative has had notable impacts. It is expected that this will continue on, albeit to a lesser degree, following the re-opening of the economy, with centres such as Muine Bheag and Tullow likely to retain a higher proportion of their convenience shopping trade.

Mode of Transport Used - From Survey

In terms of the mode of transport used, the vast majority of respondents surveyed travel by car (90%), whether they are the driver or just passenger, to do their main food shopping. 8% of respondents noted that they walk and a further 1% have their shopping delivered.

Mode of Transport Used - Update

Given the nature of convenience shopping and the fact that there has been no significant improvement in public transport provision in County Carlow, the mode of travel used when undertaking the main grocery shop is unlikely to have altered.

The future trend in relation to Grocery Fulfilment Centres, is also unlikely to change this as it will place the 'last mile' collection on the consumer.

Frequency of Shopping - From Survey

Respondents were asked to state the frequency of carrying out their main food and grocery shopping; the results are illustrated in Figure 4.7. This illustrates that the majority of respondents carry out their main food and grocery shopping on a weekly basis (69%). A further 18% of respondents carry out their main convenience shopping 2 - 3 times a week.

Frequency of Shopping - Update

The nature of the main food and grocery shop means that the results from the Survey are unlikely to have changed. Albeit during Covid-19 restrictions, in line with public health guidance, people trying to limit their movements may have resulted in less frequent main convenience shopping trips. This trend may or may not continue post Covid-19.

Convenience Satisfaction Rating - From Survey

Respondents were asked if they were satisfied with where they carry out their main food and grocery shopping. The responses to this question displayed a high level of satisfaction, with 98% of respondents stating that they were either "very satisfied" or "satisfied" with where they carry out their main food and grocery shopping.

Of the very limited number of respondents who stated that they were dissatisfied with where they carry out their main convenience shopping reasons stated included "too expensive" and "poor range of goods".

Convenience Satisfaction Rating - Update

Those who stated that they were dissatisfied with where they carried out their main convenience shop due to a "poor range of goods" were from Muine Bheag. The addition of a Lidl to the Town will improve the range of convenience goods within the Town which may alter this response.

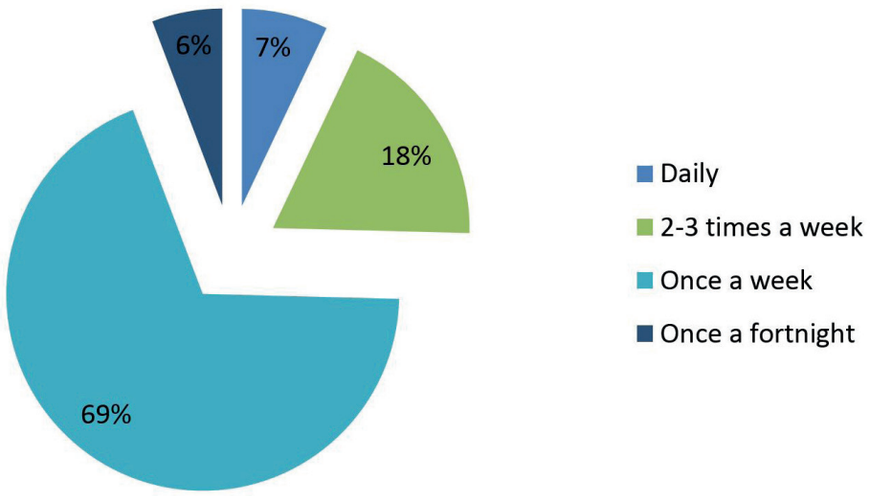


Figure 4.7: Frequency of undertaking Main Convenience Shopping

Top-Up Shopping - From Survey

The household survey also obtained information on top-up shopping patterns within the County, see Figure 4.8. Respondents were asked where they carry out their main "top-up" shopping. Given the nature of this form of shopping a high level of expenditure retention would be expected, with the following of note from the survey:

- 98.5% of all respondents within the County undertook their main top-up shopping within the County.
- Carlow Town retained 92.8% of its top- up shopping
- Tullow retained 81.1% of its top-up shopping in the area
- Muine Bheag retained 67.6% of its top-up shopping in the area

The above figures demonstrate a notable difference in the level of top-up shopping expenditure retention in the key centres in the County.

The most popular form of transport used for top-up shopping was by car, with 76% of respondents noting that they drive or are passengers in a car when carrying out their top up shopping. 22% of respondents walk reflecting the classification of the most popular location for "top-up" shopping at a local store.

Top-Up Shopping - Update

Given the nature of top-up shopping a high level of expenditure retention is expected. While Muine Bheag notably retained less of this expenditure than Carlow Town or Tullow the addition of the Lidl will enhance its convenience retail offer and should improve top-up shopping retention within the Town.

In addition, during Covid-19 people were encouraged to stay local and this initiative has had notable impacts which would be reflected in top-up shopping expenditure given its nature. It is expected that this trend will continue following the re-opening of the economy, given a move towards remote working. Centres such as Muine Bheag and Tullow are likely to benefit from this trend and retain a higher proportion of their top-up shopping expenditure.

More people shopping locally for their top-up shopping should also have a positive impact in terms of the reduction of vehicular trips in favour of more sustainable modes of transport such as walking and cycling.

Where Respondent Lived (No. Respondents)	Where Respondents Shopped								
	Carlow Town	Co. Carlow East	Co. Carlow South	Co. Kildare	Co. Wicklow	Co. Wexford	Co. Kilkenny	Portlaoise	Shop Around
Carlow Town (69)	64	1	2	-	-	-	-	-	2
Muine Bheag (37)	5	2	25	-	-	2	-	-	3
Tullow (33)	4	27	1	-	-	-	-	-	1
Co. Kildare (31)	2	-	-	28	-	-	-	-	1
Co. Kilkenny (12)	1	2	2	-	-	7	-	-	-
Co. Laois (15)	7	-	-	1		-	-	6	1
Co. Wexford (9)	-	-	-	-	-	9	-	-	-
Co. Wicklow (18)		3			15				
Graiguecullen (8)	8	-	-	-	-	-	-	-	-
Total	**91**	**35**	**30**	**29**	**15**	**11**	**7**	**6**	**8**

Figure 4.8: Principal shopping locations used for top-up shopping

Updating the Survey Findings - Comparison Shopping

Comparison Shopping Trends - From Survey

The Survey also examined comparison shopping trends by asking Respondents:

Which town, shopping centre, retail location or shop they would normally visit for their main clothes and footwear purchases.

The results are tabulated in Figure 4.9.

The results to this question demonstrate the following:

- There is a high level of comparison expenditure retention, with 87% of respondents who live within County Carlow carrying out their main clothing and footwear shopping in the County.
- 83% of all respondents within the County carried out their main comparison shopping in Carlow Town in line with its role within the County retail hierarchy.
- Both Muine Bheag and Tullow retain very low market share levels within the County at 1% and 3% respectively.
- 64% of all residents surveyed in the remainder of the catchment area outside of County Carlow noted that they undertook their main comparison shopping in Carlow.
- Outside of Carlow Town, Dublin and Kilkenny were cited as the main location for comparison shopping by residents within the County.

Comparison Shopping Trends - Update

The findings in relation to comparison shopping within the survey area are unlikely to change. Carlow Town retains its Level 1 status in the retail hierarchy and is the main centre for comparison shopping offer in the County. Newer shopping centres such as Fairgreen offer large floorplate suitable to high street comparison retailers as well as retaining traditional retailers in the Town Centre such as Shaws and independent and boutique offer. The recently permitted extension to the Fairgreen Shopping Centre demonstrates the ongoing demand for modern format comparison retail floorspace in the Town.

As identified as part of the update to the Health Checks, Muine Bheag and Tullow continue to have a limited comparison retail offer. While any improvement in this would have to be in line with their position as Level 2 Centres in the retail hierarchy there is scope for improvement and additional comparison offer. Section 9 of the Strategy identifies the opportunities presented for these Towns in terms of new trends such as community and experiential retailing, with potential for the promotion of combined niche retailing, local industries and tourism.

Where Respondent Lived (No. Respondents)	Where Respondents Shopped							
	Carlow Town	Tullow	Muine Bheag	Co. Kilkenny	Dublin	Athy	Newbridge	Gorey
Carlow Town (78)	82%	1%	1%	5%	9%	-	1%	-
Muine Bheag (44)	89%	-	2%	5%	2%	-	-	-
Tullow (44)	77%	9%	-	-	7%	-	2%	-
Co. Kildare (43)	67%	-	-	-	5%	21%	5%	-
Co. Kilkenny (19)	32%	-	-	47%	5%	-	-	-
Co. Laois (29)	69%	3%	-	17%	3%	3%	-	-
Co. Wexford (9)	67%	-	11%	-	11%	-	-	11%
Co. Wicklow (27)	67%	-	-	-	4%	-	4%	7%

Figure 4.9: Main Clothing/Footwear Shopping Location

On-Line Comparison Shopping Trends - From Survey

The Survey also sought to obtain information regarding on-line comparison shopping trends within the catchment area, see Figure 4.10. The survey results indicate the following:

12.5% of all respondents carry out comparison shopping on-line

However, in considering the above, regard should be had to the frequency and quantum of comparison shopping carried out on-line. This includes:

- 12.5% of respondents who stated that they carry out their comparison shopping on-line 4.8% noted that they carry out over 25% of their clothing shopping on line
- 4.2% stated that they carried out less than 10% of their comparison shopping on line
- 3.5% stated that they carried out between 10% to 25% of their comparison shopping on line

"Do you shop on the internet for your main clothes/footwear shopping?"

	Yes	No
Total	12.5%	87.5%
Co. Carlow	10.2%	89.8%
Co. Kildare	17.4%	82.6%
Co. Kilkenny	14.3%	85.7%
Co. Laois	18.8%	81.3%
Co. Wexford	11.1%	88.9%
Co. Wicklow	27.3%	72.7%

Figure 4.10: On-Line Comparison Shopping Trends

On-Line Comparison Shopping Trends - Update

The market share of on-line shopping for comparison goods was already increasing pre Covid-19. The closure of 'non-essential' retailing during the multiple Level 5 lockdowns has had a significant impact in terms of speeding up this shift to on-line retailing. More significantly it has resulted in new on-line consumers who prior to the Pandemic had not engaged with retailing on-line. In addition, the

Where Respondents Shopped						
Kildare	Arklow	Enniscorthy	Portlaoise	Waterford	Baltinglass	Clonmel
-	-	-	-	-	-	-
-	-	2%	-	-	-	-
5%	-	-	-	-	-	-
2%	-	-	-	-	-	-
-	-	-	-	11%	-	5%
-	-	-	-	3%	-	-
-	-	-	-	-	-	-
-	7%	4%	4%	-	4%	-

Covid-19 Pandemic has also witnessed the closure of the bricks and mortar stores of a number of High Street brands including, Oasis, Debenhams and Topshop. These stores now have an on-line presence only, meaning brand loyal customers can only access these products via the internet.

The increased numbers utilising the internet for comparison goods shopping, has however, been impacted by Brexit. Many British brands have temporarily closed their Irish sites while British website have suspended Irish deliveries amid uncertainty around import fees and duties.

Given that the move to on-line comparison retail was already established and that the issues associated with Brexit will be resolved in the near future, it is expected that the numbers utilising the internet for their main clothes/footwear shopping will have increased significantly on-foot of Covid-19. While the initial easing of restrictions during the summer of 2020 showed the ability of the retail sector to bounce back and establish market share it is expected that a high portion of consumers will continue to shop on-line, albeit less frequently than during restrictions.

While an increase in market share of on-line comparison retailing since the previous Retail Strategy was almost inevitable, some of the new trends identified in Section 3 demonstrate a renewed interest in bricks and mortar retailing. Community retail has seen people return to the streets of where they live, while experiential retail puts the focus back on the customer experience in-store as much as on-line. Finally, the trend towards on-line stores needing off-line spaces has witnessed some big brand name on-line retailers set up physical stores.

Such trends indicate that while on-line retailing is gaining in popularity, there is still a place for bricks and mortar retailing and the experience associated with this type of comparison offer. This was demonstrated by the numbers of consumers who came out to visit comparison stores before Christmas following the easing of restrictions.

Main Reason for Shopping at Comparison Store Location - From Survey

As part of the Survey respondents were asked to state their main reasons for shopping at the store/ location where they carry out their main clothing and footwear shopping. The results are presented in Figure 4.11below.

The main reason stated by respondents were as follows:

- 40% citied "close to home"
- 19% cited "wide choice of goods"
- 12% "good value for money"
- 11% cited "good quality products"

Main Reason	Total	Co. Carlow	Outside Carlow
Close to Home	40%	42%	37%
Wide Choice of Goods	19%	19%	19%
Good Value for Money	12%	11%	13%
Good Quality Products	11%	14%	7%
Close to Other Shops	2%	2%	2%
Ease of Parking	1%	2%	1%
Close to Work	1%	1%	1%
Good Public Transport	1%	1%	1%
Parking cheap/free	0%	1%	2%
Other	12%	8%	17%

Figure 4.11: Main reason for shopping at comparison store location

Main Reason for Shopping at Comparison Store Location - Update

As with convenience shopping, proximity to home is the main consideration when choosing a comparison shopping location. While an increase in on-line shopping may change the market distribution of comparison shopping it is not expected to change the fact that when undertaking a comparison shop people will choose to go to the nearest centre that offers the goods they require.

While the drive to stay and shop local during Covid-19, did impact day to day shopping patterns, it is unlikely to have a long term impact on comparison shopping patterns as the range and offer of such products is concentrated in higher order centres in line with the retail hierarchy. This is especially the case in Carlow where Carlow Town has a good comparison retail offer whereas both Muine Bheag and Tullow have a limited offer, as reflected in the trade leakage from these settlements.

Mode of Transport Used - From Survey

The findings of the Survey showed that the majority of respondents surveyed, 87%, travel by car to do their main clothing/footwear shopping, including both as the driver and as a passenger. 7% of respondents walk and 2.5% of respondents take the train.

Mode of Transport Used - Update

Given that proximity to home was the main reason respondents choose their comparison goods shop location and the fact that there has been no significant improvement in public transport provision in County Carlow, the mode of travel used when undertaking comparison shopping is unlikely to have altered.

While the increase in on-line shopping may result in fewer trips, the mode of transport when undertaking a trip is unlikely to change.

Frequency of Shopping - From Survey

Respondents were asked to state the frequency they carry out their main comparison shopping. The results are illustrated in Figure 4.12. This illustrates an even split of 27% each for those undertaking their shopping once every 3 months and those undertaking it very 6 months.

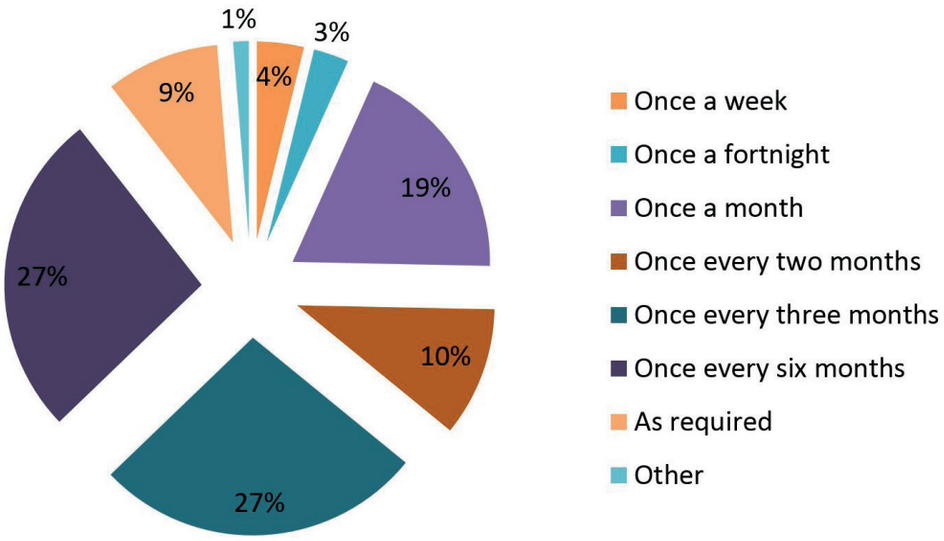


Figure 4.12: Frequency of undertaking Comparison Shopping

Frequency of Shopping - Update

The increase in on-line shopping has the potential to alter the frequency with which people undertake comparison shopping as it can be done virtually any time and any where with no restrictions due to opening hours or travel.

As bricks and mortar retailing becomes more of an experience, the frequency with which people undertake such retailing is unlikely to change.

Comparison Satisfaction Rating - From Survey

Respondents were asked if they were satisfied with where they carry out their main comparison shopping. The responses to this question displayed a high level of satisfaction, with 87.6% of all respondents stating that they were either "very satisfied" or "satisfied" with where they carry out their main clothing and footwear shopping. The responses, however, varied throughout the catchment area with slightly, higher levels of dissatisfaction evident within the Tullow and Bagenalstown areas. See Figure 4.13.

Those who stated that they were either dissatisfied or very dissatisfied with where they carry out their main comparison shopping cited the following:

- 65.6% "poor range of goods"
- 6.3% "too expensive"
- 6.3% "poor shopping environment".

Within the Tullow and Munie Bheag areas of the catchment the main reason cited for dissatisfaction include "poor range of goods".

Convenience Satisfaction Rating - Update

A substantial percentage of those in the Muine Bheag and Tullow areas, 15.9% and 14.3% respectively were "Not Satisfied" with where they carried out their main comparison shop. As "Close to Home" was the main reason cited for choosing the comparison store location, it is unsurprising that Muine Bheag and Tullow have high levels of dissatisfaction as both settlements have a recognised limited comparison retail offer.

As outlined in Section 9, there are opportunities for these Towns in terms of new trends such as experiential retailing, with potential for the promotion of combined niche retailing, local industries and tourism. However, the real opportunity may be in the form of community retailing as more people work remotely, meaning they are not commuting to large centres on a daily basis and will thus be reliant on local centres more for their comparison shopping needs. Supporting an improvements in comparison retail provision in smaller towns such as Muine Bheag and Tullow.

Satisfaction Rating	Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Not Satisfied	Very Dissatisfied
Carlow Town Area (79)	50.6%	34.2%	6.3%	7.6%	1.3%
Carlow South - Muine Bheag (4)	31.8%	50%	2.3%	15.9%	-
Carlow North East - Tullow (42)	38.1%	45.2%	-	14.3%	2.4%
Outside Carlow (126)	45.2%	47.6%	2.4%	4.0%	0.8%
Total	**43.6%**	**44%**	**3.1%**	**8.2%**	**1%**

Figure 4.13: Comparison Shopping satisfaction Levels

Updating the Survey Findings - Bulky Goods Shopping

Bulky Goods Shopping - From Survey

As part of the Survey, respondents were asked to identify where they carried out their main bulky good shopping. The definition of bulky goods was split between furniture and electrical goods within the questionnaire as many people would shop at different locations for these goods.

The Survey findings demonstrate the following:

- 97% of all respondents carrying out their main bulky goods shopping within the County.
- Carlow Town acts as the principal location for bulky goods shopping for residents within the County.
- 35.5% of bulky goods expenditure into Carlow from areas of the catchment area outside of the County.

The results are presented in Figures 4.14 and 4.15.

Where Respondent Lived (No. Respondents)	Where Respondents Shopped												
	Carlow Town	Tullow	Muine Bheag	Hacketstown	Rath-villy	Athy	Kilkenny	Newbridge	Gorey	New Ross	Dublin	Co. Laois	Co. Wicklow
Carlow Town Area (70)	95.7%	1.4%	1.4%	-	-	-	-	1.4%	-	-	-	-	-
Carlow South - Muine Bheag (34)	41.2%	5.9%	47.1%	-	-	-	2.9%	-	-	2.9%	-	-	-
Carlow North East - Tullow (32)	50%	43.8%	-	-	3.1%	-	3.1%	-	-	-	-	-	-
Outside Carlow (86)	36%	5.8%	4.7%	2.3%	-	19.8%	8.1%	5.8%	7%	3.5%	3.5%	2.3%	1.2%

Figure 4.14: Furniture Goods Shopping Location

Where Respondent Lived (No. Respondents)	Where Respondents Shopped												
	Carlow Town	Muine Bheag	Tullow	Athy	Gorey	Baltinglass	Kilkenny	Newbridge	Dublin	Kilarney	Waterford City	Graiguecullen	Arklow
Carlow Town Area (70)	94.3%	1.9%	-	-	-	-	-	-	1.9%	-	-	1.9%	-
Carlow South - Muine Bheag (34)	53.6%	42.9%	3.6%	-	-	-	-	-	-	-	-	-	-
Carlow North East - Tullow (32)	86.2%	3.4%	6.9%	-	3.1%	-	-	3.4%	-	-	-	-	-
Outside Carlow (86)	16%	3%	2%	63%	6%	2%	3%	1%	-	1%	1%	-	1%

Figure 4.15: Electrical Goods Shopping Location

Bulky Goods Shopping - Update

The results from the survey findings in relation to bulky good are unlikely to have significantly changed in the intervening period. In this regard the level of retail warehouse provision has remained largely the same, albeit with some of the retail warehouse parks in Carlow Town that were new at the time of the previous Retail Strategy now occupied. This would have only acted to further strengthen the bulky goods retail offer of the County and the position of Carlow Town.

As identified in Section 10, where retail warehousing has been vacant long term, especially in areas where there is a mix of retail warehousing and warehousing, there is the opportunity to use this for e-commerce operations. While not directly retailing it is putting such units to use in the retail sector and supporting retailers operating within the County and beyond.

On-Line Bulky Goods Shopping Trends - From Survey

The Survey also sought to obtain information regarding on-line bulky goods trends within the catchment area. The survey results indicate only 2.9% of all respondents stated that they carried out their bulky goods shopping on line.

On-Line Bulky Goods Shopping Trends - Update

Given the nature of bulky goods retailing it is not expected that the findings from the survey would have significantly changed. In this regard most retailers of such products operate from bricks and mortar stores, allowing people to view what are normally high value items prior to purchase.

While the Covid-19 Pandemic may have had an impact on on-line sales, especially in the area of electronics, retailers of bulky household goods were considered 'essential' and permitted to remain open. As consumers could still undertake their shopping for such products in their usual manner, it is unlikely that there would be a lasting impact on on-line sales of bulky goods on foot of the Pandemic.

Main Reason for Shopping at Bulky Goods Store Location - From Survey

As part of the Survey respondents were asked to state their primary reasons for shopping at their main bulky goods shopping locations. The results are presented in Figure 4.16.

Main Reason	Total
Close to Home	41%
Good Value for Money	24.1%
Good Quality Products	11.5%
Other	11.2%
Wide Choice of Goods	8.1%
Close to Work	1.7%
Ease of Parking	1.4%
Close to Other Shops	0.7%
Good Public Transport	0.3%

Figure 4.16: Main reason for shopping at bulky goods store location

Main Reason for Shopping at Bulky Goods Store Location - Update

As with convenience and comparison shopping, proximity to home is the main consideration when choosing a bulky goods store. Given its nature and as bulky goods shopping is expected to remain largely bricks and mortar retailing into the near future, the reasons for choosing a bulky good store are expected to remain largely unchanged.

Mode of Transport Used - From Survey

In terms of mode of transport used for bulky goods shopping, 71.5% of all respondents surveyed travel by car, either as a driver or passenger. A further 18% have their shopping delivered.

Mode of Transport Used - Update

Given the nature of bulky goods retailing this is unlikely to have changed.

Bulky Goods Satisfaction Rating - From Survey

Respondents were asked if they were satisfied with where they carry out their bulky goods shopping. The responses to this question displayed a high level of satisfaction, with 95% of all respondents stating that they were either "very satisfied" or "satisfied" with where they carry out their bulky goods shopping.

Those who stated that they were either "not satisfied" or "very dissatisfied" with where they carry out their bulky goods shopping cited the following:

- 40% "poor range of goods"
- 20% "too expensive"
- 20% "poor shopping environment".

100% of those who cited "poor range of goods" were from Muine Bheag, while those who cited "poor shopping environment" were from Graiguecullen and those who cited "too expensive were from" Carlow Town.

Bulky Goods Satisfaction Rating - Update

As items such as range and price are market issues, these will only change through increased and improved competition. For example some large bulky goods retailers now promise to price match their competitors, including sale prices.

What is interesting it that "poor range of goods" was the reason for dissatisfaction in Muine Bheag. Considering the level of retail warehouse provision it has for a Town of its scale, it would be expected to offer a satisfactory level of bulky goods to meet basic demands. Maximising the permitted retail warehousing in Muine Bheag should be encouraged.

Updating the Survey Findings - Competing Centres

Competing Centres - From Survey

The Survey also aimed to obtain information on competing centres. The Survey asked respondents if they travel to centres outside of County Carlow for shopping purposes. The results to this question illustrate that Dublin, Newbridge, Kilkenny City and Kildare Village act as the main competing centres to Carlow.

Figure 4.17 illustrates the results to this question and provides a breakdown of the nature of each visit to centres outside of the County. It shows that the main reason for travelling to competing centres is for clothing and footwear purchases.

Where Respondents Shopped	What Respondents Bought		
	Grocery	Clothing & Footwear	Furniture/ Electrical Items
Dublin (48)	-	94%	6%
Waterford (11)	-	73%	27%
Kildare Village (29)	-	100%	-
Kilkenny (41)	-	100%	-
Portlaoise (3)	-	100%	-
Newbridge (45)	-	100%	-
Athy (6)	-	67%	3%
Newross (1)	-	100%	-
Arklow (3)	-	100%	-
Gorey (5)	40%	40%	20%
Total	**43.6%**	**44%**	**3.1%**

Figure 4.17: Centres Visited and Purpose of Visit outside of Co. Carlow

Respondents were also asked how often they visited centres outside of County Carlow for shopping purposes. The results show that the majority of respondents travel to competing centres on an infrequent basis. As shown in Figure 4.18 the majority of respondents outlined that they visited competing centres "once or twice a year".

The results to these questions on competing centres coupled with the high expenditure retention levels for comparison shopping as evidenced from the household survey results demonstrate the prominence of Carlow Town as the main comparison centre within the catchment area.

Competing Centres - Update

Given the nature of trips to other centres and also their infrequency it is unlikely that there would be any noticeable change since the Survey was undertaken. While an improvement in offer at a competing centre may result in some change, for example the completion of Phase 2 of the Kildare Outlet Village since the previous Retail Strategy, these would likely be off-set against improvements in the retail offer within County Carlow and Carlow Town in particular. In this regard permission has recently been granted to extend the Fairgreen Shopping which will enhance the comparison offer of the Town.

While the Covid-19 Pandemic and the associated restrictions would have impacted consumers ability to travel for such retail, as it is of a relatively infrequent nature, once restrictions are lifted shopping patterns would be expected to return to normal.

Where Respondents Shopped	Frequency of Visits to Competing Centres			
	Once a Fortnight	Once a Month	Once or Twice a Year	Only Once
Dublin (48)	2%	17%	65%	17%
Waterford (11)	-	1%	73%	18%
Kildare Village (29)	-	7%	72%	21%
Kilkenny (41)	2%	29%	66%	2%
Portlaoise (3)	-	33%	67%	-
Newbridge (45)	9%	11%	71%	9%
Athy (6)	-	-	83%	17%
Newross (1)	-	100%	-	-
Arklow (3)	-	-	100%	-
Gorey (5)	-	40%	40%	20%
Total	**43.6%**	**44%**	**3.1%**	

Figure 4.18: Frequency of Visits to Competing Centres

Main Attractions of the Centre - From Survey

Respondents to the Survey were asked to identify what they felt were the main attractions of the centre in Carlow that they visited most often, i.e. either Carlow Town, Muine Bheag or Tullow. Figure 4.19 shows the results for each centre. The following are of note:

- "Close to home" and "ease to get there by car" and "good parking provision" were ranked as the top three attractions to each centre.
- "Good choice of department/variety stores" and "good choice of clothing and footwear shops" were key attractors for Carlow Town and Tullow

Main Attractions of the Centre - Update

The main attractions that draw people to a specific location to do their shopping are unlikely to change. As demonstrated during the easement of restrictions in summer 2020 and prior to Christmas 2020 the retail maker has the ability to regain its market share relatively quickly and steadily. Thus it would be expected that people who visited a centre due to the range of goods on offer or parking provision would continue return to this centre

The two areas where we may see some change is in relation to the number of people who are attracted to a centre due to its closeness to home. In this regard, the message to stay local has had a notable impact on people shopping locally, a trend which is likely to increase on foot of the growing popularity of community orientated shopping. While this will perhaps see an increase in those who chose a centre based on its proximity to home, the growth in this will still be somewhat limited by the range of retail on offer, specifically outside Carlow Town.

The other area relates to the emerging trend of experiential shopping. In this regard there is likely to be an increase in those that choose a Centre based on its "attractive shopping environment", "pedestrian streets", "good choice of places to eat and drink" and "safe environment", all of which are central to the consumer experience.

Main Attractions to Each Centre	Carlow Town (164)	Muine Bheag (53)	Tullow (54)
Close to Home	29%	36%	30%
Good Choice of Department/Variety Stores	6%	-	6%
Good Choice of clothing & footwear Shops	4%	-	7%
Ease to get to by car	10%	11%	7%
Good parking provision	7%	6%	4%
Good shopping malls	4%	2%	-
Good choice of places to eat and drink	4%	6%	4%
Free Parking	4%	-	4%
Attractive shopping environment	4%	4%	4%
Good choice of cheap/discount shops	5%	-	4%
Good facilities for children	3%	2%	2%
Good choice of quality/designer shops	1%	4%	2%
Easy to get to by bus	1%	-	-
Pedestrianised Streets	1%	2%	-
Close to Work	-	2%	2%
Good facilities for the disabled	1%	-	-
A Particular store	1%	-	-
Safe environment/no crime	-	-	2%
Dont know	9%	2%	2%
No Reason	4%	-	2%
Other	5%	25%	20%

Figure 4.19: Main Attractions of each centre

Suggested Improvements - From Survey

As part of the Survey respondents were asked to identify what improvements would encourage them to shop in each centre on a more regular basis. The range of improvements listed by the respondents are provided in Figure 20.

The requirement for "cheaper/free parking" and "more parking provision" ranks highest in Carlow Town while the requirement for "more shops" is ranked highest within all Muine Bheag and Tullow.

Suggested Improvements - Update

While cheaper/free parking and more of it are standard suggested 'improvements', of note in response to this query is the number of items that relate to improving the overall experience provided by a centre. These included "streetscape/ environment", "cafés/restaurants", "leisure facilities", "seating areas/public amenity areas" and "safety/ security". While the numbers relating to each individually was not large, in combination they demonstrate the importance of the overall shopping experience the centres offered.

In line with the trend of experiential retailing it is expected that the importance of such considerations in choosing a centre will increase and that consumers will demand improvements not just to retail or car parking provision but to the elements of the Centre that deliver an overall experience.

Suggested Improvements	Carlow Town (125)	Muine Bheag (46)	Tullow (40)
Cheaper/free parking	16%	13%	3%
More Shops	9%	24%	25%
More Parking Provision	13%	9%	5%
Improved access by car	6%	9%	5%
More shopping malls/centres	2%	9%	8%
More public toilets	6%	-	5%
Improvements to the streetscape/environment	3%	2%	5%
Better public transport provision	4%	2%	-
More designer shops/boutiques	1%	-	8%
More cafés/restaurants	1%	4%	5%
More leisure facilities	1%	2%	-
Improved cleanliness	1%	-	-
More seating areas/public amenity areas	2%	-	3%
More gyms/health clubs	-	-	-
Improved safety/security during the day/night	2%	-	-
Crèche	-	-	3%
More facilities for the disabled	2%	-	-
More cash machines	-	4%	-
More events	1%	2%	5%
More pedestrianised streets	-	-	-
Don't Know	9%	4%	-
Nothing	7%	4%	10%
Other	16%	11%	13%

Figure 4.20: Suggested Improvements to each Centre

Health Checks

5

Introduction

This Section updates the health checks and retail profiles of the main urban centres in County Carlow undertaken under the previous Retail Strategy. In doing so it draws on the Town and Village Health Checks undertaken in 2017 and the Town and Village Key Project Plans for Tullow and Muine Bheag (Bagenalstown) undertaken in 2018.

The following centres have been reviewed and updated:

- Carlow Town
- Tullow
- Bagenalstown

In line with the previous Retail Strategy the commentary on the below centres has also been reviewed and updated:

- Rathvilly
- Leighlinbridge
- Hacketstown
- Ballon
- Borris
- Tinnahinch (and Graiguenamanagh)
- Carrickduff (and Bunclody)

Annex 2 of the RPGs addresses and provides guidance on the assessment of the vitality and viability of Town Centres. A health check looks at the strengths and weaknesses of town centres and is a qualitative analysis of the factors that impact and influence the vitality and viability of a centre. The RPGs identifies amenity, accessibility, attractions and action as being components of all round "health" of a centre, stating that a good appreciation of these can be attained by undertaking a vitality and viability health check assessment using a variety of indicators. The RPGs outline the following as appropriate health check indicators:

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

While the RPGs provide a comprehensive list of indicators it must be noted that some of the information is not available for centres outside of the main cities and towns, for example shopping rents, pedestrian flows and pattern of movement in retail rents within primary shopping areas.

In order to determine the vitality and viability of existing town centres in County Carlow the previous Retail Strategy utilised the following indicators in line with the RPGs:

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

It also examined factors such as the extent of recent development and the suitability of existing floorspace. The indicators and factors utilised in the previous Retail Strategy in conjunction with the information and indicators contained in the Town and Village Health Checks undertaken in 2017 have formed the basis of the update of the Health Checks.

In addition, the previous Retail Strategy included a clear definition and maps of the core retail areas in Carlow, Tullow and Muine Bheag (Bagenalstown). These have also been reviewed as part of the undertaking of this Retail Strategy with amended maps provided, see Appendix A.

As discussed in Section 4 the updating of the vacancy survey has been a challenge in the context of the current Covid-19 Pandemic and the imposition of a national lockdown and the closure of non-essential retail. In this regard the recently published GeoView Commercial Q2 2020 Report on Commercial Property is referenced. While this Report examines all commercial building stock and is not as detailed with regard to vacancy in the retail sector, it does provide an early panoramic view of the business impact of the Pandemic on commercial properties across Ireland and also allows for vacancy levels within the three main Towns to be compared with national averages.

While it has not been possible or viable to undertake a detailed vacancy survey, including the mapping of vacant units as per the previous Retail Strategy, it is again noted that Carlow County Council are to commission a Land Use Map for Carlow Town Centre, part of which will include a detailed assessment of current vacancy within the Town in layers relevant to floors.

The Health Checks also examined the diversity of use in the Town Centre i.e. the representation of different types of floorspace. The diversity of uses is an important factor in considering the vitality and viability of a town/city as non-retail uses such as restaurants, cafés and leisure attractions can be attractors for a centre, playing an important role in contributing to its vibrancy and vitality. A successful town/city centre will have a range of types of uses in addition to retail that in combination make it an attractive place. Certain uses can, however, also detract from the amenity and attractiveness of a town centre, and these too need to be considered in terms of its vitality and vibrancy.

Many such uses, including hospitality and leisure, were closed under the restrictions in place at the time of undertaking this Strategy. In undertaking the update of the Health Checks, a presumption has been made that these will reopen once restrictions are lifted as most did under the last easement of restrictions.

Based on the updating of the Health Checks, the key actions and recommendations for Carlow, Tullow and Muine Bheag (Bagenalstown) as the main centres within County Carlow are set out in Section 9 of this Retail Strategy. In addition, potential retail opportunity sites have been addressed within these settlements and are identified in Appendix A.

Carlow Town

Introduction

Carlow Town is located in the north west of County Carlow, approximately 80km southwest of Dublin on the M9 motorway. It is close to the county boundaries of both Laois and Kildare, with the River Barrow which runs through the Town, creating a natural boundary between Co. Laois and Co. Carlow. The Town, which grew from 23,030 people in 2011 to 24,272 people in 2016, is the main county town and primary centre of population in County Carlow.

The Town is an important market town, serving an extensive rural hinterland that extends north into Kildare and west into Laois. It offers a wide range of retail, commercial and professional services as well as being a centre of education, accommodating two third level institutes, Carlow College, St. Patrick's and the Institute of Technology Carlow (IT Carlow). Carlow also accommodates a number of cultural and tourist facilities including Carlow Castle and County Carlow Military Museum, the VISUAL and George Bernard Shaw Theatre and Carlow County Museum. Carlow Town is also a centre of employment in the County with Burnside Autocyl, UNIM and MSD based in the area.

Identification of Core Retail Area

Within Carlow Town the traditional town centre is recognised as Tullow Street and Dublin Street. Shaw's Department Store, located on Tullow Street, has been trading in Carlow since 1949 and attracts a high volume of consumers to the Town Centre. However, in the past 20 years or so development in the Town Centre has been concentrated to the south east of the traditional Town Core.

Past Government tax incentives, such as the urban renewal schemes, also contributed to the expansion of the Town Centre in an easterly direction including the development of the Carlow Shopping Centre, the Fairgreen Shopping Centre and the Hanover Retail Park further south. This has resulted in a geographical shift from the traditional core retail area of the Town and has lead to issues with integration and accessibility between the traditional core and the newer retail areas.

The retail offer of the Town Centre is distributed between the traditional commercial core located along Tullow Street, Dublin Street and the Potato Market and the more recent shopping centres. Retail units on Tullow Street and Dublin Street tend to be of a relatively small scale accommodating uses such as independent retailers, boutiques, sporting shops, cafés and restaurants while the newer shopping centres providing larger floor plates making them more attractive to multiples and chain stores.

Accessibility

Carlow Town is strategically located on the M9 and on the intercity rail line, which links Dublin to Waterford City. Services from Carlow are infrequent, with an hourly frequency at peak times and gaps of up to three hours between services during the day. The train station is within a 5-10-minute walking catchment of the Town Centre.

With regard to bus services, JJ Kavanagh operate on the Dublin-Waterford route, with 13 daily services from IT Carlow and Carlow Coach Park to Dublin Airport. Bus Eireann – Expressway routes 4 and 4X link Carlow with Dublin Airport as well. Other services to regional destinations such as Wexford, Portlaoise,
Tullamore, Athlone, and Naas, are less frequent.

On-street car parking is available throughout the Town, including in the core retail area of Tullow Street and Dublin Street. The Fairgreen Shopping Centre, Potato Market and Hanover Shopping Centre all provide surface car parking. Carlow Shopping Centre is served by a multi storey car park. Whilst some areas can become oversubscribed during peak periods, there is generally a sufficient level of parking in Carlow to meet the needs of the Town[38].

Footpaths within the core of the Town are generally of adequate condition and width. In certain locations, on-street parking, bollards and street furniture reduces the area available to pedestrians – leading to a sense that these streets are dominated by vehicular traffic. While there are several crossings located within the Town Centre, there is also a lack of pedestrian priority and crossing points on several key pedestrian desire lines.

Investment in cycling has taken place in Carlow in recent years, with the provision of cycling lanes along the N80- bypass and some of the regional roads. In the Town Centre cycle lanes have been provided along Barrack Street, Bridge Street and Hanover Road[39]. Project Carlow 2040: A Vision for Regeneration sets out potential solutions to the existing issues centred on the need for a new approach to vehicle management that provides a balance between cars, pedestrians, cyclists and public transport links[40].

Natural Environment and Built Heritage

Carlow Town Centre has undergone some enhancements in recent years with the visual appearance of the western end of Tullow Street in particular being upgraded. New wider footpaths were installed as were new street surfaces. The partial pedestrianisation of the street also improved circulation and the quality of the environment for shoppers.

Tullow Street and Dublin Street as the traditional retail core retain many original shopfronts, contributing to the character and built form of the Town Centre. This character is reinforced by other historical buildings such as Carlow Cathedral, the Courthouse and Carlow College, St. Patrick's.

There is scope for improvements to the public realm of the Town Centre including street lighting, planting, and pedestrian and cyclist accessibility.

Fairgreen Shopping Centre - Carlow Town

Actions

Project Carlow 2040: A Vision for Regeneration includes a walking strategy that contains a number of new pedestrian routes within Carlow, linking residential areas to key attractions, with a focus on removing severances and improving connectivity. This strategy also includes recommendations to improve the width and condition of existing footpaths, the implementation of safe crossings that reflect pedestrian desire lines and proposals to upgrade junction arrangements to reduce delays to pedestrians.

The provision of street furniture such as benches, and the delivery of the 30km/hr zone will enhance the experience, safety and comfort of pedestrians living in, studying, working and visiting Carlow Town.

A cycling strategy has also been prepared to address existing gaps and facilities in the network, with a focus on creating a series of safe and continuous segregated cycle routes. The cycling strategy also looks to build upon Carlow's wealth of

natural assets and rich biodiversity, particularly along the River Barrow and River Burrin, through the delivery of a series of green routes within the Town[41].

Overall Project Carlow 2040: A Vision for Regeneration, seeks to further enhance the Town Centre environment through the delivery of high quality and person-centred buildings and public realm, a diversity of uses and the creation a Town perceived as an exciting and safe place to live, work and visit[42]

Existing Retail Environment

Carlow Town is well represented by a range of both national and international comparison retailers. Due to its more modern large floorplate offer, Fairgreen Shopping Centre accommodates a large concentration of international comparison units including Heaton's, JD Sports, River Island, Next, New Look and Argos. Permission was granted in May 2020 by An Bord Pleanála for the demolition of an existing retail unit / commercial building (Unit 27) comprising 874 sqm and the construction of 1 no. two-storey retail unit of 3,732 sqm (gross floor area) with ancillary office and staff facilities (Reg. Ref. 19/198, Board Ref. 305709) demonstrating the ongoing attraction of the Centre to retailers. Penney's anchors Carlow Shopping Centre on Kennedy Avenue, which also includes *inter alia* Peter Marks, Sam McAuleys and Dolmen Jewellers, as well as a cafe with a cinema located adjacent.

The smaller traditional sized units within the Town Centre along Tullow Street and Barrack Street generally accommodate independent and family owned shops with the notable exception of the large Shaw's Department Store on Tullow Street. These are considered as a vital component of the retail mix of the Town as they add diversity to the Town's retail profile, enhance the overall vitality and viability of the core and contribute to the emerging experiential shopping trend.

While the Town has a strong offer in terms of the number of multiples operating, its independent retailers maintain a strong presence within the core retail area. There is also a concentration of vintage stores and charity shops along Dublin Street.

Tullow Street - Carlow Town

In terms of convenience retail provision, the Town is served by Tesco in Fairgreen Shopping Centre, Aldi on Hanover Road, Lidl on Tullow Road and SuperValu to the east of the Town anchoring the Sandhills District Centre on Hacketstown Road. There is also an Aldi on Church Street and a Dunnes Stores anchoring the Sleaty District Centre at Sleatygraigue Retail Park Graiguecullen, west of the River Barrow in Co. Laois. A network of smaller scale convenience floorspace also serves the environs area of the Town.

Carlow Town is also well served in terms of retail warehouse provision. Hanover Retail Park west of Hanover Road is anchored by Woodies and also includes other operators such as Carpet Right, Harry Corry, Homestore and More and Right Price Tiles. To the north east of the Town within the environs, on the R448 with frontage onto the main Dublin Road, is

the Four Lakes retail park with Curry's, PC World, the Range and Maxi Zoo. There is also a recent change of use application at this Park to allow traditionally on-line retailer Screwfix to occupy one of the units (Reg. Ref. 20/372). Deerpark Retail Park opposite the IDA Business Park on the Dublin Road accommodates furniture and interior design bulky good retailers.

Vacancy

Vacancy levels and the number of underutilised/ vacant sites within Carlow Town has increased in recent years. These include the terrace of currently vacant houses on Barrack Street, the former Bank of Ireland site close to the Civic buildings on the Athy Road and the adjacent lands along the Barrow Track, the former cash & carry site on Kennedy Street, the cultural quarter around Carlow College, the Pembroke area, as well as the core Town Centre blocks[43]. This increase has negatively impacted the vitality and vibrancy of the Town, permeability within it as well as resulted in a lack of a sense of a core.

The recently published GeoView Commercial Q2 2020 Report on Commercial Property estimates that Carlow Town has a vacancy rate of 18.2%, a decrease of 0.1% from the same time in 2019. This is notably above the national average of 13.5% and Tullow at 14.7% but below Muine Bheag (21.7%).

The Report attributes the vacancy across a range of types of uses with 'Service' accounting for 45.5% of the overall vacancy and 'Retail and Wholesale' 29.6%. Based on this there would be a vacancy level of c.5.4% attributable to retail and wholesale in terms of the total stock of commercial premises in Carlow Town. While this overall number does not provide as accurate an account of retail vacancy as the survey undertaken as part of the previous Retail Strategy, which found a vacancy level of 28% within the core retail area, it does allow for comparison nationally as well as with other key centres within the County.

Conclusion

The quality and quantum of retail goods on offer in Carlow Town reflects its Level 1 County Town Centre designation and its Key Town status from the RSES. The Town offers a range of types and scales of retail units from the more traditional, smaller floorplate units in the retail core on Tullow Street and Dublin Street to the larger modern floorspace in the Carlow and Fairgreen Shopping Centres to the south east of the Town. The concentration of national and international convenience and comparison retailers in purpose built shopping centres has resulted in a geographic shift of the retail activities within the Town Centre.

In line with the findings of Project Carlow 2040: A Vision for Regeneration, the Health Check Assessment identifies a lack of permeability between the traditional town core retail area of Dublin Street and Tullow Street and the more recent modern additions to the Town Centre, specifically Fairgreen Shopping Centre. As noted in the previous Retail Strategy, the Fairgreen Shopping Centre has poor pedestrian linkages to Tullow Street and lacks profile and visibility from Barrack Street.

The fragmented nature of the retail core, identified in the previous Retail Strategy remains an issue, with limited interaction between the traditional core of Tullow Street and Dublin Street and the Town Centre expansion area. This has resulted in the weakening of the role and function of the traditional core shopping streets and issues with vacancy in the traditional Town Core, especially the western end of Tullow Street.

Project Carlow 2040: A Vision for Regeneration puts in place a regeneration vision for the Town, central to which are the six Intervention Areas that include *inter alia* Town Centre - Potato Market and Barrack Street and the Link Streets (Dublin Street and Tullow Street). These interventions will deliver improved Town Centre linkages and increased pedestrian mobility through the enhancement of existing streets to make them more pedestrian friendly as well as the provision of additional routes around the Town Centre to improve overall circulation. The integration of link streets such as Tullow Street, Dublin Street and Shamrock Square are important in this regard as they serve to enhance the vibrancy and viability of this space. The delivery of these interventions will support the vitality of the Town Centre as the retail/ commercial core while delivering the visual uplift that will unify the overall Town Centre.

Tullow

Introduction

Tullow is located on the River Slaney in the north east of the County. It is an important urban centre for the surrounding rural hinterland, providing a range of community, commercial and employment functions. The Town has experienced substantial growth in a relatively short period, developing largely as a commuter belt town to Dublin, due to the fact that the N81 traverses the Town Centre, with direct access to south and west Dublin. As of the 2016 Census the population of Tullow stands at 4,673 which is an increase of 15% from the 2011 census.

Tullow is a Level 2 Sub County Town Centre in the County Retail Hierarchy, is the main retail centre located in the north east of the County and serves an extensive retail catchment area that includes adjoining areas in County Wicklow and to a lesser extent Kilkenny and Kildare. The Town provides a range of services including grocery/ butchers, pharmacy, post office, bank, credit union, florists, hairdressers, barbers, in addition to a number of public houses along the Main Street. The primary and secondary retail areas also contain a large number of professional services, including solicitors and estate agents as well as offices, health centre /GP/dental facilities, childcare facilities and schools. Stand alone restaurants and cafes are less evident within the Town.

Permission has also recently been granted in Tullow for the construction of a metal clad industrial warehouse unit of 33,089 sq.m floor area on behalf of Carlow Warehousing Ltd. (Reg. Ref. 18/95, Board Ref. 303343-19). As part of the company's e-commerce operations, which includes an existing warehouse in Muine Bheag (Bagenalstown), the new warehouse will act as a storage unit for international retailer Smyths Toys.

Identification of Core Retail Area

The Town Centre is defined by a traditional townscape with narrow streets leading to and opening into Market Square and Bridge Street. This area represents the main retail core and accommodates the majority of shops, including SuperValu, retail and professional services, bars and restaurants. Part of Mill Street is also in the retail core.

Market Square is largely dominated by non-retail and retail service uses such as beauty and hair salons, a bank, taxi rank and auctioneers. Newer additions to the retail offer of the Town, specifically convenience retail including Tesco, Lidl and Aldi, have located at edge of centre locations with Tesco and Lidl to the south west and Aldi to the north east. Tesco is directly linked to the Town centre via a footbridge over the River Slaney. The development of these convenience retailers at the edge of the Town Centre has resulted in the development of a secondary retail area within Tullow.

Accessibility

Tullow is located approximately 16km to the south east of Carlow Town and is accessible via the R725. Tullow is approximately 18km to the south of Baltinglass via the N81, with the N81 also providing direct access to Dublin (Tallaght) and the M50 (80km). The M9 is located approximately 8km to the West of Tullow and is accessed via the N81 and N80, making it accessible to the major urban centres of Kilkenny City (49km), Waterford City (91km), Naas (52km) and Dublin (80km)

Bus Eireann route 132 operates between Dublin and Tullow and Tullow and Wexford with four services each way between Dublin Monday to Friday, two on a Saturday and three on Sunday. This route also serves Baltinglass, Blessington and Tallaght. This is an enhanced service from that previously offered by route 132 following the removal of Route 5 between Dublin and Rosslare Europort. JJ Kavanagh and Sons operate a daily service between Hacketstown and Carlow Town, serving Tullow, approximately twice a day in each direction, Monday to Friday. Tullow is also served by Local Link Wexford with the Tullow - Enniscorthy - New Ross route serving the Town with one service to and from the Town Saturday and Sunday and three to and from the Town Monday-Friday. Tullow is not served by a rail, with the nearest train station located in Carlow Town.

The dominant form of transport within the Town is the private car, with a considerable amount of vehicular traffic passing through the Town Centre. This in combination with the Town's narrow streets and the single crossing point over the River Slaney results in congestion, particularly on Bridge Street and Church Street at peak hours.

There is free on-street car parking throughout the Town, with a one-hour restriction in operation on Market Square. In terms of car parks, there is a surface public car park on Barrack Street, located to the rear of SuperValu and a car park off Market Square/Mill Street adjacent to the Credit Union. The latter has a set fee for parking, resulting in on-street parking in the surrounding area and under utilisation of the car park. There are a number of other surface car parks associated with businesses in the Town.

Due to the traditional narrow streets within the Town many of the footpaths are also narrow resulting in a relatively poor pedestrian environment, especially given the heavy traffic within the Town. The bridge over the River Slaney has been upgraded to provide segregated footpaths either side, and there is a pedestrian footbridge between Tesco and the Credit Union. However, there are no designated pedestrian spaces within the Town and there is a shortage of pedestrian crossing facilities, which is particularly noticeable at Market Square. There is a lack of cycling facilities or dedicated cycleways within the Town.

N81 Market Square, Main Street, Tullow

Natural Environment and Built Heritage

Tullow is one of five settlements in Carlow originating from Anglo Norman Times with several protected structures within the Town including Tullow museum. These contribute to the character of the Town and provide visual amenity. The Town's location on the River Slaney is also a defining feature of the Town, as well as acting as an important natural and biodiversity resource.

The public realm is generally well maintained, with visual interest added by the traditional shopfronts in different styles and colours around Market Square and Bridge Street. The relatively recent large cobble type paving on the Square is attractive and there is also planting on the Square in the form of trees and flower boxes.

Other locations provide good environmental quality and amenity, notably Tullow town park to the west of the River which acts as an important amenity space for the Town. The Mount Wolseley resort to the south of the Town also provides important recreational and leisure amenity for locals and tourists.

The high levels of vehicular traffic within the Town and the associated congestion have had negative impacts on environmental quality. The dominance of the car is also evident in the proliferation of on-street parking, particularly at Market Square, which detracts from its traditional character.

Actions

Improvements to pedestrian facilities within the Town Centre, specifically the provision of segregated footpaths on the bridge over the Slaney, have helped connect the Town Centre with the secondary retail area to the west. However, further improvements to the pedestrian environment are required, specifically around Market Square, to make it more accessible and inviting.

Facilitating multifunctional places that provide a variety of uses to meet the needs of the community they serve is an important aspect of the emerging trend of community orientated shopping.

Existing Retail Environment

Tullow has a relatively strong convenience retail offer, including SuperValu within the Town Core, Tesco and Lidl immediately south west of the Town Centre and Aldi to the north east. There are also a number of smaller convenience stores such as Spar Express adjacent to Aldi. A number of these smaller convenience stores are located at petrol filling stations on the outskirts of the Town. These stores together with independent operators largely cater for the convenience shopping needs of the local population.

Tullow is also serviced by a number of smaller independent comparison goods retailers generally located within the Town Centre but no national or international comparison multiples. There are also a number of retail warehouses on the outskirts of the Town, mainly to the south of the River on the N81 and also the Thomas Traynor Road and in the Tullow Business Park.

Unique to the area is the popular chocolate shop named The Chocolate Garden of Ireland which offers tours and workshops and is located beside Fox's forest on the outskirts of the Town.

Vacancy

The recently published GeoView Commercial Q2 2020 Report on Commercial Property estimates that Tullow has a vacancy rate of 14.7%, a decrease of 0.2% from the same time in 2019. While slightly above the national average of 13.5%, it is well below both Carlow Town (18.2%) and Muine Bheag (21.7%).

The Report attributes the vacancy across a range of types of uses, with the majority in 'Service' at 47.6% and 'Retail and Wholesale' at 31.1%. Based on this there would be a vacancy level of c. 4.5% attributable to retail and wholesale in terms of the total stock of commercial premises in Tullow. While this overall number does not provide as accurate an account of retail vacancy as the survey undertaken as part of the previous Retail Strategy it is in keeping with its findings that vacancy levels within Tullow are low. That survey also found that vacancy levels in Tullow were significantly lower than those observed in Carlow Town and Muine Bheag (Bagenalstown).

There are a number of vacant buildings located in prominent areas of the Town including *inter alia* a cluster of vacant premises on the N81/Abbey Street junction. In addition, much of the Thomas Traynor Road comprises of unmaintained industrial and commercial units and yards, some of which are vacant, presenting an unattractive entrance to the Town.

It is also noted that most commercial premises in the Town Centre do not support residential accommodation on upper floor levels.

Conclusion

Tullow functions as a convenience retail centre for the surrounding catchment as well as providing a range of complementary uses such as financial institutions, restaurants and public houses. In its retail function it is considered that Tullow is continuing to perform relatively well, offering a good range of convenience retail multiples.

There remains scope to improve and expand retail facilities, particularly comparison retail, in the Town Centre core which would assist with reinforcing the Town's role and function as a service centre as well as complementing the existing small range of independent providers. An appropriate increase in the comparison retail offer would also better provide for the needs of the Town's extensive catchment and reduce the need to travel greater distances to larger town centres on a regular basis.

There is scope to enhance the Town Centre environment by addressing the current high levels of vehicular traffic within it, improving the pedestrian environment and providing additional crossing facilities, specifically in Market Square.

It is considered that potential also exists for the delivery of a greater range of complementary facilities and services, such as cafes and restaurants, together with an increased range of comparison retail. The appearance of the Town could also be enhanced by making visual improvements to vacant premises until they are occupied and/or redeveloped.

Muine Bheag (Bagenalstown)

Introduction

Muine Bheag (Bagenalstown) is located to the south of the County on the River Barrow. The Town has a strong built and cultural heritage being a planned town laid out largely in the 18th century along a grid system implemented by Walter Bagnall and was the first to install dual-language street signs in 1911, which remain in place today.

Muine Bheag acts as an important economic centre for the south of the County, providing economic, residential, retail and community services and serves an extensive retail catchment area that includes adjoining areas in County Kilkenny. As of the 2016 Census, the population of Muine Bheag (Bagenalstown) stands at 2,837 which is a decrease of 3.8% from the 2011 Census.

Muine Bheag (Bagenalstown) is served by a range of community and educational infrastructure including primary and secondary schools, health centre, community centre, library, credit union and fire station. The large Fair Green Park in the centre of the Town is an important amenity feature, with the Town also accommodating a number of sporting amenities and clubs and an outdoor swimming pool.

The River Barrow is a key feature of Muine Bheag, though it is somewhat detached from the Town Centre due to the original design pattern of the Town. The Quays area has been subject to urban renewal, with some infill apartment developments, however, areas of dereliction remain along the River front.

Identification of Core Retail Area

The Main Street in Muine Bheag, runs for approximately 120m from High Street to Kilree Street and along with High Street, Fair Green North and Pump Street is the focus of retail development. The area surrounding the Market Square and running along Main Street and Kilree Street accommodates more traditional town centre uses such as retail, grocers, butchers, pharmacies, hairdressers, banking etc., while secondary streets (e.g. High Street) provide a mix of traditional retail and professional services (estate agents) together with residential housing.

To the west of the Town is the Royal Oak Industrial area which accommodates a number of industries and some limited retail warehousing provision.

Accessibility

Muine Bheag (Bagenalstown) is located c. 20km from Carlow Town and 23km from Kilkenny city on the R705 Leighlinbridge/Carlow to Borris/ New Ross regional road. It is strategically located c. 8km from Junction 6 on the M9 Dublin to Waterford motorway and adjacent to the R448. The R724 runs along Church Road and Kilcarrig Street and continues eastwards to the villages of Fennagh and Myshall . Muine Bheag and Royal Oak are directly linked via the R724. The proximity of the M9 strategic transport corridor has significantly increased the accessibility of the Town.

Muine Bheag (Bagenalstown) is served by a railway station and is located on the Dublin to Waterford rail line and is a scheduled stop on this route for passengers. Seven services depart daily to Dublin Heuston and seven services depart to Waterford Monday to Friday with four in either direction on a Sunday.

Bus Eireann and private operators also provide a regular bus service to Kilkenny, Waterford and Dublin. Bus Eireann operates the no. 4 bus, Waterford to Dublin Airport route. J.J Kavanagh & sons operate the no.873 Loughboy to Carlow Route via Muine Bheag (Bagenalstown).

In terms of accessibility within the Town Centre there is a considerable amount of traffic circulating, however, the one way system helps manage traffic flow. The historic grid pattern allows for ease of movement through the Town Centre, with pedestrian accessibility generally good with large footpaths and

designated pedestrian areas. However, the Quays appear somewhat removed from the Town Centre and as a result do not benefit from much pedestrian traffic. The pedestrian realm in this area could be significantly improved.

The Town Centre has limited car parking facilities, with the main car park located adjacent to the SuperValu store on Pump Street. A large area of surface parking also serves the Aldi store at Blogers Yard to the east of the Town Centre, with an additional 107 car parking space at the new Lidl store on the Royal Oak Road, on the western side of the Town. There is also on-street parking throughout the Town Centre which is free for a 2 hour period. Car parking also dominates the Market Square, impacting on its amenity value and use as a civic space.

Pedestrian connectivity within Muine Bheag Town Centre and leading to Royal Oak, is generally good. However, the quality of the footpath varies throughout the Town. Connectivity between the Town Centre and the residential areas, educational, employment, recreational, and tourist destinations is limited, and thus prohibitive to encouraging increased walking.

There are no designated cycle paths or cycling infrastructure within Muine Bheag/Royal Oak.

Natural Environment and Built Heritage

As noted previously, Muine Bheag has a very distinctive character grounded in its history, particularly its unique built heritage, street grid patterns and architectural heritage. The townscape character of the historic Town Centre, with its pattern of two and three storey buildings with fine grain and pitched roofs should be maintained and enhanced as part of any future development of the Town. The presence of derelict historical buildings such as Rudkins Mill, present opportunities for the positive enhancement and for increased attractions within the Town Centre.

Redeveloped buildings along the River Barrow in Muine Bheag

The Town is generally well maintained with a unique character attributable to the built heritage and natural feature of the River. The riverside walk and redeveloped mill buildings complement the character. However, there is room to improve the environment of the Town Centre through further public realm improvements and soft landscaping particularly in the core retail areas and along the Quays.

There is potential for future backland development within the Town Centre, particularly along Stationhouse Road and to the south of Kilcarrig Street. These areas currently accommodate large scale industrial and manufacturing in active use which if relocated in the future would release large areas of the Town Centre for redevelopment.

Bagenalstown is also home to a unique heated outdoor swimming pool which is opened early June until late August every year. The swimming pool is highly popular during the summer months and is a tourist attraction for the Town.

Actions

Notwithstanding its unique heritage and well maintained public realm in terms of pedestrian routeways, street furniture and the urban environment, there is a need for further investment and regeneration to increase the vitality and viability of the Town Centre.

Existing Retail Environment

The retail function of Muine Bheag (Bagenalstown) is primarily focused on meeting day to day services and local convenience retailers. The floorspace study indicates that almost half of all retail floorspace is bulky household floorspace, which is primarily concentrated in the Royal Oak Industrial Estate to the west of the Town.

Multiple representation is in the form of small symbol stores and a SuperValu, which has recently been granted an extension, an Aldi and a new Lidl. The area surrounding the Market Square and running along Main Street and Kilree Street is characterised by traditional town centre uses including a number of independent small butchers, green grocers and newsagent shops. The main Post Office is located in the Spar convenience store at the Texaco garage on Church Street.

Comparison offer is limited within the Town, particularly ladies and children's clothing shops and footwear shops. There is also a general lack of tourism facilities including cafes and restaurants. In terms of the night time economy there are a number of public houses.

Carlow Warehousing, located to the east of the Town, has evolved from a traditional warehousing business into one that includes the first and largest e-commerce fulfilment centre in Ireland with over 50,000 square metres of storage capacity. Their success in this emerging area is evident from their planned expansion in Tullow to provide a second warehouse unit of 33,089 sq.m floor area.

The Town is also host to O'Hara's Brewery and Royal Oak Distillery. Both establishments are open for tours and promote a growing economy in the area. The Town also provides a range of other tourist attractions which could be used to further promote and attract more people to the town.

Vacancy

The recently published GeoView Commercial Q2 2020 Report on Commercial Property estimates that Muine Bheag (Bagenalstown) has a vacancy rate of 21.7%, an increase of 0.3% from the same time in 2019. This level of vacancy is substantially above the national average of 13.5%, and also the rates experienced in both Carlow Town (18.2%) and Tullow Muine Bheag (14.7%).

The Report attributes the vacancy across a range of types of uses with 'Service' accounting for 47.9% of the overall vacancy and 'Retail and Wholesale' 27.8%. Based on this there would be a vacancy level of c.6% attributable to retail and wholesale in terms of the total stock of commercial premises in Muine Bheag (Bagenalstown).

While this overall number does not provide as accurate an account of retail vacancy as the survey undertaken as part of the previous Retail Strategy it is in keeping with its findings that vacancy levels within Muine Bheag (Bagenalstown) were much higher than those of Carlow Town and Tullow.

Conclusion

While Muine Bheag (Bagenalstown) is an important market town its retail function and offer is however, somewhat limited. While the convenience offer will improve on foot of the new Lidl store, the comparison offer is particularly limited and there are opportunities to expand this.

The Town has an attractive streetscape and accommodates a number of historic attractions and buildings of architectural merit. Opportunities to develop the tourism role of the Town should be promoted. In addition, the Town should look to its existing unique attributes, including Brewery and Whiskey Distillery, as an opportunity for new niche retailing within the Town Centre.

Other Settlements

Leighlinbridge

Introduction

Leighlinbridge is a small traditional village which is located on the River Barrow, it is home to the Leighlinbridge Castle also known as the Black Castle. The Village has a picturesque setting and an attractive streetscape, including a number of buildings of architectural merit and traditional vernacular architecture.

According to the 2016 Census the population of Leighlinbridge was 914 people in comparison to 828 people in the 2011 Census which is an increase of 9.4%.

The Village is serviced by a small number of convenience shops located within the Village as well as a hotel (Lord Bagnal Inn), Credit Union and several public houses. Community services and facilities include the Leighlinbridge health centre, nursing home, community hall, churches and a dedicated sheltered housing initiative for the elderly.

Accessibility

Leighlinbridge is served by the R448 Dublin/ Waterford route which bypasses the Town Centre and by interchanges to the M9 Dublin to Waterford route. Leighlinbridge is also served by good road links to Muine Bheag (Bagenalstown), Tullow and Carlow with the R705 providing direct access to Muine Bheag/Royal Oak (5km). Carlow Town is 14km north, via the R448, which also accesses the M9.

Bus Éireann operates six direct services daily between Leighlinbridge and Carlow Town.

On street car parking is widely available throughout the Village which often obstructs traffic flow due to the narrow nature of the streets. There are also a small number of car parks in the Village.

Footpaths throughout the Village vary in condition, with the majority in good condition, however, due to the historical nature of the streets some footpaths are narrow.

There are currently no cycle lanes within the village.

Natural Environment and Built Heritage

Leighlinbridge has an attractive natural environment with the River Borrow being a positive attribute to the Town. Leighlinbridge Castle which is thought to be one of the first Norman castles in Ireland, is located within the Village and overlooks the River Barrow. In addition the Town has been subject to a number of environmental and civic improvements in recent years.

Litter management is good, there is attractive planting and shopfronts are well maintained. There are also a number of attractive mill buildings, some of which have been converted for residential use. Planting and seating areas are provided along the river and signage demarcates an historical trail. The Barrow Way offers a high-quality walking trail to Muine Bheag and as far as St Mullins. The Vivaldi Gardens is an attractive feature at the entrance to the Village.

Existing Retail Environment

Retail representation within the Village is limited, consisting primarily of small independent retailers including grocers, pharmacists, newsagents, barbers, butchers), in addition to restaurants, public houses and a hotel. The petrol station on Seskin Road accommodates a Centra, however, there is a notable absence of any significant convenience facility within the Village core.

On the outskirts of the Village is the Aboretum Development, a retail development focussed around a garden centre and which provides a cafe and large retail area dedicated to the sale of clothing, homewares, garden equipment and general lifestyle goods. The development is a significant attraction at the County, Regional and National levels.

In terms of evening economy the hotel provides an evening restaurant and pub with 2 other pubs within the Village.

Vacancy

There is generally a low level of vacant and/or derelict units within the Village. Where there are vacant units there has been an effort to maintain the unit so as not to detract from the public realm.

Conclusion

Having regard to the attractive natural environment, its unique historical attractions and ease of accessibility, the significant tourism potential of the Village could be further developed and enhanced.

Opportunities for enhanced convenience provision in the Village core should be explored as should the development of niche retail uses.

Leighlinbridge Village Centre

Ballon

Introduction

Ballon is located to the south east of County Carlow, with a strong archaeological heritage, specifically the site of national significance at Ballon Hill and Ballykealy Manor.

The Village itself centres on one main street. The Village accommodates a range of uses such as public houses, a takeaway, a primary school and a community centre. The Village also contains some small industries including timber works and fireplace manufacturing.

The 2016 census reported a population of 712 people.

Accessibility

Ballon is strategically located on the N80 road and is 11km from Carlow Town. Wexford Bus company operate two daily bus services that connect Carlow to Ballon, Bunclody, Enniscorthy and Wexford on Route 376.

The R132 Bus Eireann service provides 2 daily services to and from the Village Monday to Friday, 1 services each way Saturday and 2 on Sundays.

Parking within the Village is mainly on-street. Footpaths are in good condition, running the length of the Main Street, however, there is no cycle pathways within the Village. There is one pedestrian crossing, located outside the primary school on Main Street.

Natural Environment and Built Heritage

Ballon Village was originally part of Ballykealey's former estate, which is now a popular hotel offering unique heritage.

The Village is attractive with flower beds, hanging baskets and trees. Overall, the Village appears tidy and well maintained.

Existing Retail Environment

Ballon has a limited retail offer with an Express shop on Main Street along with a butcher, a Carry Out off license, Centra shop at the Top Oil petrol station and a Spar at the Texaco petrol station. There is also a café located at Chapel Street. Outside of the Village there is a hairdresser, electrical shop and christening gown shop.

There are two public houses within the Village which cater to the evening economy.

There are no post or banking facilities in the Village.

Vacancy

There are a number of vacant units within the Village, including a newer development of 4 no. units on Main Street which is not fully occupied.

Conclusion

Occupation of existing, modern commercial units in the Village core should be promoted and encouraged. This would help consolidate the Village core which is somewhat dispersed due to the long linear nature of the Main Street.

Main Street, Borris

Borris

Introduction

Borris is located in the west of County Carlow and has been an important settlement in Carlow for several hundred years. The linear Town serviced Borris House and estate and acts as a market centre for a wide hinterland up to the present day.

The Town accommodates a range of uses including public houses, a bank, hair salon, take-away, bookmakers and tea rooms. There are two educational facilities within the Town, a primary and secondary school and a library. The Town is also serviced by a Bank of Ireland, a small post office and the Step House Hotel.

The north east of the Town, along the Fenagh Road, accommodates a number of industries, many of which specialise in engineering.

In 2016 the population of Borris was 652 people which is a minor change from 646 people in 2011.

Accessibility

Borris is located 30km from Carlow Town and 13km from Bagnesltown and is served by two regional roads, the R705 from Muine Bheag (Bagenalstown) to Graiguenamangh and the R702 from Goresbridge to Kiltealy.

Due to the linear nature of the Main Street, traffic is generally free flowing through the Town. Traffic calming measures, in the form of speed ramps, are in place outside Borris Vocational school.

On-street parking is provided free of charge throughout the Town. However, cars parking on the footpath causes an obstruction.

General improvements are required to footpaths where there are gaps and uneven surfaces. Part of the rail viaduct has been converted into a walking route.

There are no designated cycle paths in the Town.

Natural Environment and Built Heritage

The Town is tidy and well presented. Borris House and the former railway viaduct are two of the most unique features of the Town, however, the distinctive built heritage also creates a defined character. The Town displays a traditional and well-maintained streetscape with granite used throughout.

Borris House and estate is located to the south west of the Town, it is a popular tourist attraction. Borris viaduct is a sixteen-arch limestone built in 1860. Construction has commenced on the Borris railway viaduct project which is supported under the Rural Regeneration and Development Fund under Ireland 2040. The project will link the Borris railway viaduct to the amenities of Borris town and give a safe circuit for walkways thorough the beautiful vistas the viaduct and local roads provide.

Existing Retail Environment

Borris serves as the retail centre for a larger rural catchment area, including parts of County Kilkenny. The Town has a linear street layout with most shops located on the north side of the street and consisting of traditional shop frontages.

Borris is served by a number of small local and independent convenience and comparison stores. Uses include a number of newsagents, pharmacy, gift shop and butchers, as well as a Centra and Mace. There is a small unique local jewellery/crafts boutique located on Main Street which promotes local designers and products. There are no large-scale retail units operating in the Town.

Vacancy

Vacancy rates are relatively low, with vacant units on the Main Street maintained so as not to detract from the streetscape.

Conclusion

Opportunities for enhanced retail provision in the Village core should be explored.

The redevelopment of one of the most iconic treasures in south Carlow, the railway viaduct, will create a tourism and local amenity experience in Borris, presenting opportunities for niche retail within the Town.

Tinnahinch (& Graiguenamanagh)

Introduction

Tinnahinch (Graiguenamanagh) is located in the south east of County Carlow on the River Barrow in between Brandon Hill in County Kilkenny and Mount Leinster in County Carlow. Graiguenamanagh in County Kilkenny is located on the opposite side of the River Barrow.

The 2016 Census recorded a population of 1,475 persons living within Tinnahinch-Graiguenamanagh.

Accessibility

Tinnahinch (Graiguenamanagh) is located 16km from Thomastown, 33km from Kilkenny City, 40km from Carlow Town, 19km from New Ross and 41km from Waterford City. Tinnahinch is located approximately 10 kilometres to the south of Borris.

Graiguenamanagh is served by one bus service to and from Kilkenny City Monday-Saturday. Graiguenamanagh is also served by 'Ring a Link' which operates 2 bus services from the Town to Muine Bheag (Bagenalstown), each Saturday and to Carlow Town each Monday and Wednesday.

The private car is the main form of transport, with through traffic resulting in traffic congestion on Main Street despite the provision of traffic calming measures.

There is limited on-street parking on Main Street which often obstructs traffic flow. The main public car parks in Graiguenamanagh are at the Main Street, Aldi and to the rear of SuperValu. The car park at Aldi provides direct pedestrian access onto Main Street via 'Well Lane'.

Footpaths throughout Tinnahinch and Graiguenamanagh are narrow but are generally in good condition. There are no cycle lanes.

Natural Environment and Built Heritage

Tinnahinch has a rich built heritage, with the ruins of Tinnahinch Castle remaining in place at the east bank of the River Barrow, the castle was originally built in 1615. The George Semple Bridge forms an attractive landmark linking Tinnahinch with Graiguenamanagh.

Graiguenamanagh is home to Duiske Abbey, originally a Cistercian Monastery, now a Catholic parish church, there is also a popular heritage trail throughout the area. There is also a Duiske Glass Gift Shop and Cushendale Woollen Mills.

Existing Retail Environment

There is only one retail premises in Tinnahinch which comprises of a convenience store. Tinnahinch also provides a number of restaurants and public houses.

Graiguenamanagh in County Kilkenny, located on the opposite side of the River Barrow, provides a range of retail and retail service uses. The main convenience shops are SuperValu on lower Main Street and Aldi at the Harristown Roundabout. There is also a butcher, hairdressers, sport shop, take-aways, a Bank Of Ireland as well as several public houses within the Town.

Conclusion

A Joint Local Area Plan for Graiguenamanagh -Tinnahinch, 2020 has been prepared and is at Draft stage. It supports the primacy of the Town Centre as the focus for future retail, commercial activity and community life and encourages a mix of retail and commercial, civic, social and cultural uses in addition to residential development.

The Draft LAP supports improved connectivity between Graiguenamanagh and Tinnahinch through enhanced pedestrian linkages. Reducing traffic congestion is also one of the key priorities of this Plan which is to be achieved through the provision of enhanced pedestrian and cycle routes to reduce traffic movements throughout the Town.

Addressing the high number of derelict buildings and under-utilised sites within the Town is also a priority for the Plan. Both Councils are keen to promote and accommodate such schemes in order to stimulate investment activity in the settlement.

Vacancy

Several buildings within the main core area of Graiguenamanagh are in variable condition and there is considerable scope for restoration and sensitive redevelopment and refurbishment of existing properties as well as infill development.

There are a high number of derelict buildings and under-utilised sites, particularly along the quayside, around the Turf Market, to the north side of High Street backing onto the Mill Race and at the northern end of Main Street.

Tinnahinch (& Graiguenamanagh)

Carrickduff (Bunclody)

Introduction

Carrickduff (Bunclody) is located to the west of the River Clody to the south east of County Carlow. The Town has a picturesque setting on the River Slaney. To the east of the River Clody and west of the River Slaney is Bunclody which is located in County Wexford.

The Town is well serviced by b&b's, a golf course, shops, newsagents, public houses, restaurants, hardware store, service stations and a nursing home.

The majority of development within Carrickduff is residential in nature with some commercial development located close to the bridge across the River Clody. According to the 2016 census Carrickduff -Bunclody had a population of 1,984.

Accessibility

Carrickduff is located on the N80 national secondary road from Enniscorthy to Carlow and is also served by the R746 regional road from Kiltealy. Bunclody-Carrickduff is approximately 20 kilometres from Enniscorthy and 31 kilometres from Carlow Town.

The R132 Bus Eireann serves Bunclody, with 3 services to and 2 services from Dublin daily Monday to Friday, 1 service each way Saturday and 2 on Sundays.

Natural Environment and Built Heritage

Carrickduff (Bunclody) has a rich natural environment with the Rivers Slaney and Clody important amenities for the Town. While services are more concentrated in Bunclody, Carrickduff has a Garda Station, medical centre, library and national school. It also has an outdoor heated swimming pool which opens during the school summer holidays and is a unique feature of the Town.

Bunclody has two churches, one Roman Catholic and the other Church of Ireland. There is also a Jewish chapel at Rainsford Lodge.

Existing Retail Environment

Retail development in Carrickduff is concentrated at the local service centre which accommodates a SuperValu, a pharmacy, a cafe and a Wexford Farmers Co-Op. A large furniture shop is located adjacent. There is also a convenience store located at a petrol filling station.

There is a wider range of retail services located in Bunclody.

Vacancy

Vacancy levels are low in Carrickduff due in part to the limited number of commercial premises in the area.

Conclusion

There is the opportunity to consolidate the Town Centre of Carrickduff through the provision of additional retail and appropriate commercial activity. This would give it a sense of place as opposed to a drive through location which it has the impression of at present due to the linear nature of the Main Street.

Rathvilly

Introduction

Rathvilly is situated in the north of Carlow County and borders counties Wicklow and Kildare. It acts as an important service centre for its surrounding rural hinterland. The Slaney River flows north west and west of the centre of the Village.

The Village centre is focused around The Green which is the main square and accommodates a combination of retail and residential use. There is a primary school, a community centre, a post office, a Credit Union and two churches.

The buildings on the Main Street are mainly two storeys in height. In the centre of the Village is a monument dedicated to Kevin Barry who was a former resident of Rathvilly.

The population is 944 people according to the 2016 census compared to 811people in the 2011 census.

Accessibility

Rathvilly is located on the N81 linking Wexford to Dublin. The Village is also served by the regional route R726 linking Carlow to Baltinglass and by the local road network to Hacketstown.

The R132 Bus Eireann service provides 4 daily services to and from the Village Monday to Friday, 2 services each way Saturday and 3 on Sundays.

Parking is a mixture of both on-street and off-street in the Village Centre. There is a pedestrian crossing at the national school, however, there is no pedestrian crossing on the Main Street. In general, footpaths are good in the Village Centre and along Phelan Street and along the N81. But there are no cycle ways.

Natural Environment and Built Heritage

Rathvilly has a strong natural environment and built heritage and being built around The Green adds further character. The overall appearance of the Village is attractive and it is a multiple winner of the Tidy Towns competition.

The Village is well maintained and landscaped with planting and flowers visible around The Green. The River Slaney located adjacent to the Village is also a natural feature of Rathvilly while a small mill on the River Stanley adds to the heritage of the Village.

Existing Retail Environment

Within the Village centre, there are a limited number of retail and commercial premises including a Mace convenience store/grocers, pharmacy, hairdressers and a Post Office. There is also a public house and a takeaway in the Village.

Vacancy

There are a number of vacant units within the centre of the Village, notably by The Green. The vacant filling station at Cuckoo Corner, Bough gives an neglected appearance to this entrance to the Village.

Conclusion

Given the size of the Village, the diversity of uses available is limited. The vitality and viability of the Village would benefit from additional uses, as well as a consolidation of uses into the Town Centre, as there is currently a dispersal along the main roads entering the Village.

The Village is also underdeveloped in terms of tourism options as amenities within the centre are very limited.

Hacketstown

Introduction

Hacketstown is situated in the north east of County Carlow on the border with County Wicklow. Hacketstown represents a traditional small Irish town and performs an important local retail, social and service functions for the surrounding rural hinterlands.

It operates primarily as a goods and services centre and provides a restaurant, post office, credit union (limited opening hours), fire station, primary and secondary schools and a community centre. The Town Centre also contains several public houses and fast-food stores.

To the north of the Town is an industrial area that accommodates a number of employers. To the west, south and east of the Town the majority of development comprises of housing areas.

The population of the Town was 597 people according to the 2016 census.

Accessibility

Hacketstown is located on the R727 regional road from Arklow to the midlands. The Town is also located on the R747 regional road which leads to Baltinglass and the N9. Hacketstown is also in close proximity to the towns of Tullow, Baltinglass and Tinahely.

Traffic levels are relatively low in the Town. On-street parking is available throughout the Town, free of charge. Most of the parking is clustered around the Upper Main Street district.

Pedestrian paving in the Main Street area of the Town is well kept, however, footpaths on secondary streets would benefit from maintenance. There is one dedicated pedestrian crossing, leading to the national school, located to the south of the Town. There are no dedicated cycle paths and bicycle facilities in the Town.

Natural Environment and Built Heritage

The Town is situated within an attractive natural setting surrounded by woodland and mountains to the east. These surroundings contribute significantly to its overall attraction and environmental quality. Landscaping measures within the Town also contribute to the vitality of the Town Centre.

The Town Centre is defined by its traditional market square and wide streetscape. This area comprises mixed-use developments generally accommodating commercial uses at ground floor level and accommodation on the upper floor levels.

There are a number of buildings of heritage value within the Town, including the Catholic Church of St Bridget, which was built in the early part of the 19th century which houses a penal-time cross and part of a conventional Hay Rick stand at the front. There is also a memorial devoted to those who died during the uprising of 1798, while a 1916 monument has been erected in the green area next to it.

Existing Retail Environment

SuperValu is the main convenience anchor retailer in the Town, located on Main Street Upper at the junction with Mill Street. There is also a smaller convenience store (Londis) located in the petrol station on Moffets Lane.
Main Street also accommodates a pharmacy, butchers, barbers and hairdressers, with a large hardware shop (Lamberts) located to the south of the Town on Main Street Lower.

Mill Street located just off the Main Street comprises a mix of commercial and residential premises which are well maintained.

Vacancy

There is a relatively high rate of vacant and derelict commercial and residential units within the Town. While buildings on the west of the Main Street Upper are occupied, there is a much higher vacancy rate on the east side of the Main Street.

There are a significant number of vacant commercial and residential units along Water Street / Moffets Lane. There are also a number of large derelict / vacant sites located close to the junction of Main Street and Mill Street that impacts significantly on the vitality, viability and character of the road.

Vacant buildings on Main Street, Hacketstown

Some of the vacant buildings and derelict sites appear unmaintained and have unsightly hoarding/boarding/fencing. The dilapidated frontages detract significantly from the Towns attractiveness and vitality.

Conclusion

There is scope to improve retail provision within the Town and retain some of the existing trade leakage to other settlements.

Vacancy/dereliction is a significant issue in the Town, which not only detracts from its visual appearance but also its vitality. The appearance of the Town could be enhanced by making visual improvements to vacant premises until they are occupied and/or redeveloped.

Competing Centres

6

Introduction

This Section provides an assessment of the centres that compete with County Carlow from a retail perspective. It has been informed by the household survey, see Section 4, which identified a number of centres that residents of County Carlow travel to for retail purposes that are located outside of the County.

The main competing centres identified as part of the Household Survey included:

- **Dublin City**
- **Newbridge**
- **Kilkenny**
- **Kildare Village**

With regard to these centres the Survey results illustrated a number of trends including the following in relation to where the respondents within Carlow travel for shopping purposes:

- 27% travel to Dublin City Centre
- 25% travel to Newbridge
- 23% travel to Kilkenny
- 16% travel to Kildare Village Outlet Centre

In addition to the above competing centres, identified in the previous Retail Strategy, the Regional Shopping Centres within Dublin are also examined as many of these will provide a similar retail offer to Dublin City Centre and will have a draw to those traveling from Carlow due to their ease of access from the M50. A full list of all centres examined is shown in Figure 6.1.

As discussed in Section 4, the key attraction of the centres that are examined is comparison shopping and at the time the Survey was undertaken occasional travel for such purposes was common, with respondents stating that they travel to these centres once or twice a year.

As outlined in Section 4, the Covid-19 Pandemic and the encouragement to stay local has had an impact on people's shopping patterns. However, these one or twice yearly trips to larger or specialist retail centres is not expected to be impacted by such changes to shopping behaviour as they offer a range of comparison goods not available in a County Town such as Carlow.

The competing centre location is assessed to determine whether it has a form of retailing or specific retail offer that is considered to be attractive to residents of Carlow and for which they are prepared to travel outside of the County boundary to access. Each of the competing centres is also examined in order to determine their retail characteristics and draw and to establish their overall competitiveness.

Settlement	Retail Hierarchy Classification
Dublin City Centre	Level 1 - Metropolitan Centre
Kilkenny	Level 2 - Major Town Centre/County Town
Newbridge	Level 2 - Major Town Centre/County Town
Portlaoise	Level 2 - Major Town Centre/County Town
Kildare/Kildare Outlet Village	Level 3 – Town/District Centre
Regional Shopping Centre	**Retail Hierarchy Classification**
Liffey Valley Shopping Centre	Level 2 - Major Town Centre
Dundrum Town Centre	Level 2 - Major Town Centre
Blanchardstown Centre	Level 2 - Major Town Centre
Tallaght - The Square	Level 2 - Major Town Centre
Swords - Pavilions	

Figure 6.1: Competing Centres

Competing Settlements

Dublin City Centre

Dublin is the capital of Ireland and the Country's only city of international scale. As such, it is the economic engine of the Country. The City had a population of 554,554 as per the 2016 Census which represented a 5.1% increase on the population figure recorded in the previous Census in 2011. When taking account of Dublin's suburbs, its overall population figure was 1,173,179 in 2016. Dublin is a global hub for foreign direct investment and in recent times has successfully attracted high value jobs in ICT and financial sectors for example. The City provides a diverse range of retail and complementary services which has a high level of customer attraction.

The Retail Planning Guidelines, 2012 states that Dublin City supplies retail functions of a specialist nature not found elsewhere in the State, as well as providing the broadest range of comparison goods shopping.

Retail Facilities

As set out in the recently published Strategic Issues Paper for the Dublin City Council Development Plan, the City Centre supports around 1,500 shops and in excess of 250,000 jobs. The retail core in the City Centre encompasses areas situated to the north and south of the River Liffey with the premier shopping streets designated as either 'Category 1' and 'Category 2' shopping streets. As set out in the Dublin City Development Plan, 2016-2022, the purpose of these designations is to protect the primary retail function of these streets as the principal shopping streets in the retail core with an emphasis on higher order comparison retail and a rich mix of uses. The extent of non-retail uses at ground floor level is strictly controlled under Category 1 with an emphasis on higher order retail use. Category 2 streets exist where there is already a mix of retail and non-retail uses at ground floor.

Within the northern portion of the retail core, Category 1 streets include O'Connell Street, Henry Street and Abbey Street Middle with Category 2 streets including Parnell Street, Talbot Street and Capel Street. Situated within these Category 1 and 2 streets are the Jervis and Ilac Shopping Centres. Both centres provide a mainly comparison retail offer along with complementary food and beverage uses.

On the southern side of the River, the Category 1 streets include Grafton Street, South Anne Street and Wicklow Street. Grafton Street is widely considered to be the premier shopping street in Ireland with the Brown Thomas department store as one of its major anchors. Category 2 streets in this area of the retail core include Dame Street and College Green which run west of Trinity College, and Dawson Street which connects the university to St. Stephen's Green to the south.

As set out within the Retail Strategy for the Greater Dublin Area, 2008-2016, specialist shopping areas exist within the City away from the aforementioned core retail areas. These include designer clothing traders around Powerscourt Townhouse, furniture shops in the Capel Street area and musical instrument vendors in the South William Street locale.

In recent decades, an increasing level of retail development within Dublin has been principally accommodated outside of the retail core and within suburban areas at Blanchardstown, Tallaght, Liffey Valley, Swords and Dundrum for example. This has resulted in increased competition for the City Centre from these areas. These regional centres have grown over time and to such an extent that the aforementioned centres cumulatively have a similar floorspace quantum as that of Grafton Street and Henry Street. These centres are examined in further detail later in this Section.

Accessibility

As would be expected of a capital city, Dublin benefits from a high level of accessibility. In terms of public transport, all areas of the City are well served by a combination of either Luas, DART and Dublin Bus services. Dublin has heavy rail connections to the north to Drogheda (and onward connections to Newry and Belfast); to the south to Waterford, Carlow and Kilkenny; to the south west to Cork and Limerick and to the west/north west to Galway and Sligo.

In recent times, the road and motorway network in Ireland has benefited from substantial infrastructure funding. The City is connected to all cities and primary settlements via the national road network with Carlow situated c.85km south west of Dublin via the M7 and M9 motorways. The M50 motorway provides an orbital route around the City.

Dublin is still subject to high levels of traffic congestion particularly at peak journey times in the AM and PM periods. The City has been promoting increased use of sustainable modes of transport and the Pandemic has resulted in lower traffic volumes and an increase in walking and cycling modes in particular, with more cycle lane infrastructure and the pedestrianisation of streets being brought forward since the start of 2020.

ICT

Dublin is at the heart of Information Communication Technology (ICT), attracting the head offices of some of the biggest on-line companies including Google, Microsoft, Facebook and Twitter. As the base for technology companies, global software companies and IT service companies, Dublin has in place the IT infrastructure to allow these internationally trading companies to operate seamlessly from their Irish base.

Conclusion

Dublin City continues to the be the primary retail location in Ireland. The City offers a diverse retail offer and continues to attract high volumes of shoppers from all parts of the Country. Its retail offer is supported by complementary food and beverage and entertainment uses and a high level of hotel accommodation which has increased substantially over the last number of years. Ease of access to the City also makes it an attractive location for visitors and this is evident for Carlow residents who can avail of the heavy rail connection to Heuston Station as well as frequent bus services.

While the City maintains a strong retail presence, the onset of the Pandemic has brought new challenges for the retail sector. The impact of the restrictions and social distancing requirements, along with other economic factors such as increased on-line retail behaviours and omni-channel strategies, has resulted in some retail operators having to cease trading. Well known retailers such as Debenhams, a major anchor on Henry Street, and former Arcadia Group retailers such as Oasis, Warehouse and Topshop (at various City Centre locations) have all closed down in recent years.

While the City Centre is situated at the summit of the retail hierarchy, there have been low levels of investment in new retail floorspace in recent times overall. New retail development has generally been brought forward as part of new mixed-use schemes such as the former Clery's department store on O'Connell Street and the former Central Bank building on Dame Street which are both under construction. The increasing promotion of mixed-used development is likely to continue to see the trend of retail floorspace delivered alongside other commercial, office and leisure uses in the future in the City.

The role of the traditional retail core of Dublin City is changing. The City Centre must reimagine itself in order to offer a diversity of uses and not just as an area where people go to visit their favourite shops. Food and beverage, leisure and entertainment uses are playing a greater and increasingly important role in retail centres. These complementary uses support the retail role, and can assist with increasing the dwell time of visitors which can lead to increased levels of consumer spend. This approach is also promoting the evening and night time economy.

It is envisaged that shoppers from Carlow will continue to visit Dublin City Centre on an infrequent basis to avail of its wide ranging retail offer, specialist retail facilities, tourist and visitor attractions. Dublin City Centre continues to represent a major competitor for Carlow in terms of comparison goods trading.

Kilkenny

Kilkenny is one of Ireland's largest towns and in 2016 it had a population of 26,512. As set out within the Southern Regional Assembly RSES, Kilkenny is identified as a 'Key Town' in the settlement hierarchy which are described as being major centres for delivery of public services, with large hospitals, third level institutions, courts, local and national government functions as well as economic and business roles and higher order retail functions. In 2016, there were 13,738 jobs in Kilkenny and it is the 8th largest employment centre in the State with key sectors including agri-business, finance and tourism/ hospitality . Kilkenny is the driver of growth for the County with potential to grow by over 30% up to 2040 under the NPF.

Retail Facilities

Kilkenny is a medieval town which still exhibits its heritage character through its narrow streetscapes, historical buildings and landmarks and in particular its Castle which was originally constructed in the 13th century. Its heritage character has enabled it to become a popular visitor destination which in turn has assisted its overall retail function.

The core retail area within Kilkenny provides a diversity of services and functions and is centred around a triangle of streets comprising High Street, Rose Inn Street and St Kieran's Street. High Street has a visually attractive quality where shopfronts exhibit a traditional style and where older buildings have been successfully integrated into the streetscape, for example the Town Hall (The Tholsel) and Ulster Bank building. Market Cross Shopping Centre is situated on High Street and (prior to the Pandemic) has over 40 shops including retailers such as L'Occitane, Specsavers, Holland & Barrett and Penneys.

St. Kieran's Street is a pedestrian thoroughfare connecting Rose Inn Street to High Street/Parliament Street and which has a major anchor in Dunnes Stores. Rose Inn Street is a narrow street with an attractive retail character which links St. John's Bridge at the River Nore with the public open space adjacent to The Parade and onwards to the Castle and its gardens.

MacDonagh Junction Shopping Centre has been trading since 2007 and is situated outside of the retail core to the north east and in close proximity to the train station on Dublin Road. The Centre has over 40 retailers (prior to the Pandemic) providing comparison and convenience goods including Dunnes Stores, Boots, Champion Sports, River Island, H&M and Next alongside a selection of food and beverage operators. Kilkenny also provides a niche form of retailing at the weekly Kilkenny Castle Market which sells a variety of goods, while also serving as a visitor attraction.

Kilkenny Retail Park is situated on the outskirts of the Town to the south. The Retail Park has bulky goods operators such as EZ Living, Harry Corry, Woodies, Halfords and DID Electrical providing a variety of comparison goods for sale.

Accessibility

Kilkenny is situated approximately 40km south west of Carlow and the two settlements are interconnected via the M9 motorway and Iarnrod Éireann railway line that runs between Dublin Heuston and Waterford. As such, there is a high degree of accessibility between these centres which provides an ease of access from residents of Carlow to visit Kilkenny and particularly given the relatively short distance between the two settlements.

The Southern Regional Assembly RSES identifies a number of infrastructural objectives for Kilkenny which include the delivery of the northern extension of the ring road from the N77 Castlecomer Road to the R693 Freshford Road as part of the western by-pass from Castlecomer Road to Waterford Road.

Accessibility has been improved within Kilkenny over recent years with the completion of the N76 Callan Road Realignment Scheme, completion of Phase 1 of the Kilkenny Central Access Scheme incorporating St. Francis Bridge, and the completion of R697 Kells Road Improvement Scheme. Car parking areas are provided centrally within the Town such as the Market Yard car park off Bateman Quay and the multi-storey car park off Parliament Street.

ICT

Information technology infrastructure in terms of broadband accessibility within County Kilkenny is continuing to show a strong increase. From 2017 to 2019, there was an increase of 505 premises covered by Broadband, from 47,650 to 48,155 and an increase from 47% to 62%in commercial broadband over the same period. This increase may in part be due to the roll out of the SIRO "Fibre-to-the-Building" broadband that delivers 100% fibre-optic broadband with 1 Gigabit speeds.

Conclusion

Kilkenny is a vibrant town which serves a wide catchment and its wide range of retail options and services helps to sustain a competitive economy. Kilkenny's strong retail offer which is characterised by a mix of local and international retailers is supported by a large number of cafés, restaurants and public houses which are set within an attractive townscape. The quality of the urban environment along with its heritage character combine to make Kilkenny a pleasant place to shop, visit and eat/drink which can increase the overall dwell time for shoppers, day trippers and visitors leading to positive impacts upon consumer spend.

The Draft Kilkenny City and County Development Plan, 2021-2027 describes the appropriate level of retail development for the Town as being a key shopping destination offering a variety of convenience and comparison goods along with a range of retail and leisure services and some financial and business services . Retail objectives within the Draft Plan include enhancing and promoting the vitality and viability of the Town Centre; supporting the centre's role as the dominant retail destination within the County; and to promote Kilkenny as a shopping destination that is competitive with other comparable shopping destinations in the South East and further afield. A challenge going forward for Kilkenny is the limited number of sites with retail potential within the retail core area.

Kilkenny is considered to be a direct competitor with Carlow and this competition is facilitated by the excellent transport links between the two settlements. Kilkenny's attractive urban environment, retail choice and complementary food and beverage offer are key factors in attracting shoppers and visitors.

The provision of SIRO fibre-optic broadband will facilitate future advancements in on-line retailing and make the Town attractive for those who operate on-line and off-line stores.

Newbridge

The town of Newbridge is located within County Kildare and had a population of 22,742 in 2016 as per the Census. Within the Settlement Hierarchy, as set out within the County Development Plan 2017-2023, Newbridge is classified as a 'Large Growth Town II' with such settlements described as strong active growth towns, economically vibrant with high quality transport links to larger towns/city .

The Retail Planning Guidelines references Newbridge (along with Naas) as being a large town with important regional retailing function. Within the Regional Planning Guidelines for the GDA, 2010, Newbridge is identified with Naas as being a core economic area and is described as having a large wholesale and retail employment sector.

Newbridge has a linear pattern of development which has generally evolved in a north-south form. The River Liffey runs through Newbridge with the majority of the Town's development being situated on the western side of the Liffey including the Town Centre. The lands situated on the eastern side of the Liffey have been developed for residential, education, and religious uses along with an employment location at the Pfizer plant.

Retail Facilities

The Kildare County Development Plan, 2017-2023 establishes that Newbridge has enhanced its profile as the most important mainstream comparison shopping retail destination in the County with appeal that extends beyond the County's boundaries.

The County Development Plan, 2017-2023 designates a retail core area which is situated centrally within the Town and is bounded by Edward Street, Main Street and Military Road. The retail character of the Town is dominated by the retail offer on Edward Street/Main Street and particularly by the Whitewater Shopping Centre and the Penneys store.

Whitewater Shopping Centre is situated on Edward Street and is the largest and best anchored shopping centre outside of the Dublin Region. The Centre is anchored by Marks & Spencer (and formerly Debenhams) with operators including Clarks, Fields Jewellers, H&M, JD Sports, Stradivarius and Zara along with a complementary food and beverage offer and cinema and other services such as dentistry and opticians.

The delivery of the Whitewater Shopping Centre has been a major boost in attracting an increased level of footfall within the Town Centre. The Newbridge Local Area Plan, 2013-2019 (extended to 2021) states that the opening of the Whitewater Shopping Centre in April 2006 has contributed to the development of a modern, attractive town centre appropriate for an emerging urban centre of regional importance. This development has also reinforced Newbridge as a key commercial and retail destination in Kildare .

The Courtyard Shopping Centre is situated adjacent to the Whitewater Shopping Centre and is anchored by TK Maxx with operators including Dealz, Game Stop, Vodafone and 3. The Centre also has a complementary food and beverage offer including Eddie Rockets diner.

Within the southern portion of the retail core area are Newbridge Shopping Centre and Newbridge Retail Park. The Shopping Centre is anchored by a large Dunnes Store along with other operators such as Peter Mark hairdressing and Lloyds Pharmacy. The Retail Park is situated off Military Road and provides additional comparison and convenience floorspace. Operators in the Retail Park include DID Electrical, Home Store & More and Maxi Zoo along with Costa Coffee and Domino's Pizza. A short walking distance to the south is a Tesco Superstore and large Woodie's DIY premises on Moorefield Road.

The County Development Plan sets out a number of retail policies in respect of Newbridge which include, *inter alia*, supporting the expansion of the Town Centre and Whitewater Shopping Centre through the expansion of the retail core area.

Accessibility

Newbridge is situated c.50km north of Carlow via the M7 and M9 motorways. The two settlements are also connected via the Iarnrod Éireann railway line that runs between Dublin Heuston and Waterford. The motorway and rail networks cumulatively provide a high degree of accessibility between these Towns. Bus Eireann services provide a sustainable link to nearby towns such as Clane, Sallins and Kilcullen.

The R445 runs through the Town Centre and links Newbridge with Naas to the north east. The R445 route crosses the River Liffey at St. Conleth's Bridge which provides the only crossing point over the river within the Town. The M7 motorway is situated around the southern edge of the Town.

The County Development Plan includes an objective for a priority road and bridge project to provide a new Inner Relief Road linking Great Connell Road to Athgarvan Road (Liffey Hall junction) including a bridge crossing over the River Liffey. This will provide a second vehicular crossing over the Liffey that would improve traffic movement in the town.

ICT

According to the County Development Plan broadband is currently available in many areas throughout the County. However a number of areas of the county do not yet have adequate coverage. The 2011 Census noted that 71% of houses in the County had broadband.

Like Kilkenny and Portaloise Newbridge has the benefit of SIRO, the 100% fibre-optic broadband that delivers 1 Gigabit speeds.

Conclusion

Newbridge has a vibrant and successful Town Centre which has been consolidated by the various retail developments as referred to and principally by the Whitewater Shopping Centre which has been a retail success. Newbridge has now overtaken Naas as the premier town in the County and is an important Level 2 centre in the wider region with an attractive mix of retail operators providing a diverse range of comparison and convenience goods.

Newbridge is firmly established as a direct competing centre with Carlow which is due largely to the presence of the Whitewater Shopping Centre. However, shoppers travelling to Newbridge for comparison goods can also avail of convenience goods provided by Tesco and Lidl, for example, resulting in their overall retail requirements being met within one trip.

The provision of SIRO fibre-optic broadband will facilitate future advancements in on-line retailing and make the Town attractive for those who operate on-line and off-line stores.

Portlaoise

The town of Portlaoise is located within County Laois and in 2016 had a population of 22,050 according to the 2016 Census. Portlaoise experienced an above-average population increase of c.38% for the period 2006-2011, and is fast emerging as a main service hub for the Midlands, continuing to increase its ranking within the province of Leinster.

The Eastern and Midlands Region RSES references Portlaoise as a 'Key Town' within a Gateway Region which are described as large economically active service and/or county towns that provide employment for their surrounding areas and with high-quality transport links and the capacity to act as growth drivers to complement the Regional Growth Centres.

As set out within the Laois County Development Plan, 2017-2023, the Town is the primary settlement in the County and it has grown to become a settlement of regional importance. Retail is an important employment sector in the County with more than 75% of retail floorspace located in Portlaoise and it is necessary to retain that primacy to reduce leakage to other counties .

The Retail Hierarchy as set out within the Laois County Development Plan designates Portlaoise as a 'Principal Town' with a need to reinforce and grow high-order retail functioning with particular emphasis on the historic core defined by the Primary Retail Area .

Retail Facilities

The Portlaoise Local Area Plan, 2018-2024 designates a town centre/core retail area within the Town which roughly encompasses an area bounded by Station Road to the north; the new southern circular road to the south; Ridge Road/The Downs to the east; and Abbelyleix Road to the west. The Town enjoys a number of key assets that characterise a consolidated and compact Town Centre. Many of the key assets that make up a traditional Town Centre, along with typical retail uses, are located within the core area including churches, leisure and community facilities.

Traditional retail development is located within the northern portion of the core retail area. Market Square and Main Street provide an array of local independent retailers providing a range of comparison and convenience goods for purchase along with cafes, restaurants, public houses and professional services all of which support the primary retail offer in this locality.

Modern retail development is situated within the southern portion of the core retail area. Laois Shopping Centre is a large complex accessed off James Fintan Lalor roundabout. Retailers provide a range of comparison and convenience goods and include Tesco, Boots, Penneys, Holland & Barrett, Jysk, Lifestyle Sports and Dealz. There is a complementary food and beverage offer within the centre along with other services such as the National Driver Licence Service. Directly adjacent and south of the Laois Shopping Centre is the Kyle Centre which is anchored by Dunnes Stores. Other operators include Argos, TK Maxx and Elverys.

Accessibility

Portlaoise is situated c.40km north west of Carlow via the N80 route. The two settlements have the benefit of being situated on the Iarnrod Éireann railway network that runs to Dublin Heuston, however, there is no direct rail link between the towns. The M7 motorway is situated to the south of Portlaoise which provides an onward vehicular link to the cities of Dublin to the north east and Limerick to the south west.

Shoppers and visitors to Portlaoise have the benefit of a number of car parking areas which are pepper-potted through the core retail area and particularly at Laois Shopping Centre and the Kyle Centre. Bus Eireann route 73 provides a sustainable transport link from Carlow to Laois Shopping Centre with a journey time of 1 hour.

ICT

With regard to ICT, Portlaoise is also part of the SIRO network receiving one-gigabit fibre-optic broadband. This is around 50 times faster than average broadband speeds available in other part of the County and surrounding areas.

Conclusion

The Town Centre has a consolidated business and retail cluster which has seen a major expansion to the commercial heart located south of James Fintan Lalor Avenue. The Avenue bisects the Town Centre to the south from the traditional business core around Market Square and Main Street as described. The Town has become centred around Lyster Square, a transitional commercial space and car park linking the modern day and historical Town Centre areas.

In recent years the centre of gravity of the Town has moved to the south of James Fintan Lalor Avenue towards Laois Shopping Centre, Kyle Centre, Shaws Department Store and the cluster of other large retailers in that area.

Portlaoise's core retail area is to be the focus and preferred location for retail development during the Development Plan period. Portlaoise has a vibrant retail core but has a notable deficiency in high-end, modern comparison retail floor plates. The lack of high value comparison anchors in the town core has undoubtedly contributed to the growth of expenditure leakage from the Town's catchment area as the retail profiles of competing centres have developed at a faster pace.

Recent retail developments within the southern portion of the core retail area, such as Laois Shopping Centre, the Kyle Centre, Aldi and Lidl provide a convenience and comparison retail offer that is likely to attract residents from Carlow. The direct N80 road link between the two settlements as well as the large car parking areas associated with the aforementioned retail centres also make journeys by private car attractive.

The provision of SIRO fibre-optic broadband will facilitate future advancements in on-line retailing and make the Town attractive for those who operate on-line and off-line stores.

Kildare/Kildare Tourist Outlet Village

The Town of Kildare is located centrally within the County and in 2016 it had a population of 8,634. Kildare is accessed off the M7 motorway and situated between the settlements of Newbridge to the north east and Portlaoise to the south west.

Kildare Tourist Outlet Village adjoins the south western edge of Kildare Town. The Outlet Village originally opened in 2007 and now has more than 100 retail outlets which have a strong international retailer representation. Since its original approval, the Outlet Village has been granted permission on a number of occasions to further extend its retail offer and car parking areas.

Within the Kildare County Development Plan, 2017-2023, Kildare is categorised as a moderate sustainable growth town in a hinterland area. The function of such towns is to develop in a self-sufficient manner, reducing commuting levels and ensuring sustainable levels of housing growth, providing a full range of local services adequate to meet local needs at district level and for surrounding rural areas. Within the County Retail Hierarchy, Kildare is designated as a Level 3 Centre. The Regional Planning Guidelines for the Greater Dublin Area, 2010 state that Kildare has a thriving town centre with a strong retail offer, which has been improved with the development of a large outlet centre.

Retail Facilities

The Kildare County Development Plan, 2017-2023 designates a core retail area within the Town which is centred on Claregate Street, Dublin Road and Market Square. This area, within the Plan, is described as an area that achieves the highest rentals, best yields, is highest in demand from retailers, developers and investors and the area in which pedestrian flows are greatest. The core retail area in Kildare Town has a traditional retail offer that is characterised by local independent retailers providing a range of comparison and convenience goods. The core area has an attractive quality that is underpinned by the presence of the Market Square and some older buildings such as the Tourist Office in the Square and the Bank of Ireland building on Dublin Street for example.

The Kildare Tourist Outlet Village is the only designer outlet centre on the island of Ireland. It has a regional, national and international status and draws a large footfall of around 4 million visitors per annum. The Outlet Village is an attractive retail environment with buildings situated around a linear central pedestrian avenue with shops generally having a quaint architectural appearance. This provides an overall pleasant customer shopping experience. The Outlet Village has a strong national and international representation selling primarily non-bulky comparison goods by operators such as Prada, Hugh Boss, Calvin Klein, L'Occitane, Molton Brown, Nike, Ralph Lauren, The North Face, Ted Baker and Tommy Hilfiger. The Village also provides a complementary food and beverage offer that includes Starbucks, L'Officina by Dunne & Crescenz and Le Pain Quotidien.

Accessibility

Kildare Town is situated c.50km north of Carlow. The two settlements are principally connected via the M9 motorway and the Iarnrod Éireann network that runs from Dublin Heuston to Waterford. These transport links provide a high degree of accessibility between the Towns. The M7 motorway is located to the southern periphery of Kildare Town and the Outlet Village and provides an onward transport link to Dublin to the north east and Portlaoise to the south west.

The Outlet Village offers a substantial number of surface car parking spaces to accommodate those travelling by car. Kildare train station is 1.7km from the Outlet Village which offers a sustainable transport option for visitors, with a regular shuttle bus running between the station and the Outlet Village. A number of coach operators also provide bus services to the Outlet Village from various locations around the Country.

ICT

According to the County Development Plan broadband is currently available in many areas throughout the County. Like surrounding centres such as Newbridge, Kilkenny and Portaloise KIldare Town has the benefit of SIRO, the 100% fibre-optic broadband that delivers 1 Gigabit speeds.

Conclusion

There is no doubt that the Outlet Village has been an overwhelming retail success story for Kildare. The Outlet Village offers a wide range of comparison goods at discounted prices that are not available anywhere else in the country.

The County Development Plan acknowledges the importance of the Outlet Village and states that Kildare Town has witnessed its regional, national and international retail profile being further enhanced through the recent opening of the extension of the Kildare Tourist Outlet Centre .

Retail policy objectives within the County Development Plan seek to encourage and facilitate the further expansion of the Kildare Tourist Outlet Centre in accordance with the guidance in the Retail Planning Guidelines, 2012 and to achieve greater linkage and synergy with Kildare Town Centre.

Given that the Outlet Village attracts visitors from all parts of the Country, and also from Northern Ireland, it is evidently a major retail competitor for Carlow in terms of its discounted comparison goods offer. This competitiveness is amplified given the relative proximity of Kildare and Carlow and their accessibility linkages by road and rail and also the retail policy objectives contained within the County Development Plan as referred to.

The provision of SIRO fibre-optic broadband will facilitate future advancements in on-line retailing and make the Town attractive for those who operate on-line and off-line stores. It will also support future advancements in retailing in relation to Outlet Shopping.

Competing Regional Shopping Centres

Liffey Valley Shopping Centre

Liffey Valley Shopping Centre occupies a strategic location adjacent to the orbital M50 Motorway and is situated approximately 8km west of Dublin City Centre. Liffey Valley acts as both a Local and Regional Centre and is an economic driver for the region. The existing Shopping Centre forms part of a wider commercial campus consisting of car sales outlets, office buildings, retail warehousing, a hotel and a public house/restaurant.

The zoning of the Shopping Centre as designated 'Major Retail Centre' in the South Dublin County Council Development Plan, 2016-2022 firmly recognises and reinforces its important role and function in the area. The Shopping Centre sits in the top tier of the Retail Hierarchy for the County with clear policy objectives that include supporting Liffey Valley as a Major Retail Centre and allow for the growth of the existing shopping centre and complementary leisure, retail warehouse and commercial land uses .

Retail Facilities

The Shopping Centre provides a diverse range of comparison retail operators such as L'Occitane, Pandora, Lifestyle Sports, Tommy Hilfiger, Diesel, Marks & Spencer, Penneys and Dunnes Stores. Other retail services include opticians and chemists as well as a food court.

The most recent addition to the Liffey Valley Shopping Centre is the West End development which has enhanced the profile of the Centre in addition to offering improved cinema facilities and a greater choice of food and beverage units. At the time of writing, a new proposal has been submitted to South Dublin County Council in respect of a mixed leisure, entertainment and retail extension to the existing Shopping Centre.

Accessibility

Liffey Valley Shopping Centre has excellent accessibility and a location adjacent to the M50 motorway and N4 National Primary Route. The Shopping Centre is situated c.85km north east of Carlow. Travelling from Carlow to Liffey Valley would be principally facilitated by private car and the motorway network including the M7, M9 and M50.

Conclusion

The Shopping Centre offers a wide choice of retailers, approximately 80 stores, along with a dedicated food court and leisure uses including cinema. The combination of these factors along with ample car parking facilities and a location on the edge of Dublin City make Liffey Valley a retail location that is a competing centre for Carlow.

Dundrum Town Centre

Dundrum Town Centre is situated c.9km south of Dublin City Centre. The Town Centre (Shopping Centre) was opened in 2004 and it is one of Ireland's largest retail centres with an estimated floorspace area of c.1.5 million sqft. It is designated as a Level 2 Major Town Centre as set out within the Eastern and Midlands Region RSES.

The retail policies within the County Development Plan for Dún Laoghaire-Rathdown seeks to maintain the two Major Town Centres (Dún Laoghaire and Dundrum) as the primary retail centres in the County. This will be reflected in the nature and scale of retail and services permitted in these centres and by the integration of leisure, entertainment and cultural facilities at both locations. The County Development Plan also identifies the core retail area for the Town Centre as encompassing an area situated between Main Street and Dundrum Bypass and from Waldemar Terrace to Wyckham Way.

Retail Facilities

Dundrum Town Centre has over 100 stores providing a substantial retail offer with recognised retailers comprising, inter alia, Gap, H&M, Zara, Penney's, Hugo Boss, Calvin Klein, Hollister and JD Sports. The Centre also offers an extensive food and beverage offer, cinema and theatre.

Accessibility

Dundrum Town Centre is situated c.90km north east of Carlow. The Centre is situated in proximity to the southern end of the M50 Motorway. Within its Dublin context, Dundrum is located on the Luas Green line which provides a sustainable transport link into and out of Dublin City Centre. The Shopping Centre benefits from direct connections to the Main Street.

Similar to Liffey Valley, travelling from Carlow to Dundrum Town Centre would be facilitated by private car and utilising the motorway network comprising the M7, M9 and M50. The Centre provides car parking for over 2,300 vehicles.

Conclusion

As referred to, Dundrum Town Centre is one of the Country's largest retail centres offering a substantial choice of retailers. Its primary retail use is supported by a significant food and beverage offer with complementary leisure uses comprising a cinema and theatre. These factors along with a high level of car parking provision cumulatively make Dundrum Town Centre a very attractive retail location for residents of Carlow and similarly a competing centre.

Blanchardstown Centre

Blanchardstown Centre is situated within the north west area of Dublin City and c.9km from the City Centre. The Centre opened in 1996 and comprises a vast array of comparison and convenience retailers which is augmented by 3 no. retail parks, cinema, library, restaurants and other leisure uses with an estimated floorspace area of c.1.7 million sqft. The Centre is designated as a Level 2 Major Town Centre as set out within the Eastern and Midlands Region RSES.

Retail Facilities

Blanchardstown Centre has over 180 stores and a number of key retail anchors including Marks & Spencer, Penneys and Dunnes Stores. Retailers include, *inter alia*, Diesel, Ecco, Elverys, Flying Tiger, Foot Locker, H&M, Mango, Superdry and Smyth's Toys. The retail parks offer bulky and non-bulky goods with retailers including DID Electrical, EZ Living Furniture, Harvey Norman, Halfords, Currys PC World and Woodies.

Accessibility

The Blanchardstown Centre is situated on the N3 Route and a short distance from the M50 Motorway which provides it with an accessible location overall. The Centre is located a distance of c.85km north east of Carlow via the motorway network comprising the M7, M9 and M50. The Centre provides a high level of car parking with over c.7,000 car parking spaces for shoppers and visitors.

Conclusion

Blanchardstown Centre provides a substantial and diverse retail offer on the periphery of Dublin City. The retail offer is supported by range of food and beverage and leisure uses that in combination make Blanchardstown an attractive retail location. When determining its impact upon Carlow, Blanchardstown may not provide a distinctive enough offer that would signal it as a leading competitor for Carlow. However, its food and beverage and leisure uses may attract infrequent visits from residents in Carlow who may consider the Centre to provide a rounded shopping/dining/leisure experience.

Tallaght – The Square

The Square is situated to the south west of Dublin City and c.12km from the City Centre. The Centre opened in 1990 and has an estimated floorspace area of c.570,000 sqft. Similar to Liffey Valley, Dundrum and Blanchardstown, Tallaght is designated as a Level 2 Major Town Centre within the Eastern and Midlands Region RSES.

Retail Facilities

The Square is designed over 3 floors and offers a range of retail, retail services and entertainment facilities such as a cinema with an upper level food court. Recent developments in and around The Square have improved the experience and have opened up more attractive streets and opportunities for retailers outside of the main Shopping Centre (e.g. Tallaght Cross).

The centre is anchored by Tesco and Dunnes Stores (and formerly Debenhams). Retailers in the centre include Heatons, Dealz, Sports Direct, Boots, H&M, River Island and Eason. However, the inward facing design of the Centre means that there is limited street frontage or interaction with the surrounding streets. In addition to the lack of integration with adjacent streets, the Centre is surrounded on three sides by surface car parking and suffers from traffic congestion, making it somewhat less attractive for customers.

Accessibility

The Square has an accessible location that benefits from its position adjacent to the N81 route which facilitates direct access onto the M50 motorway. The centre is located c.77km north east of Carlow. The centre is situated adjacent to the Luas Red Line which provides a local sustainable link to the centre.

Conclusion

The Square has a fairly typical selection of retailers that are commonly found in other shopping centres and cannot be considered to provide a unique retail offer that differentiates it from the other shopping centres as referred to within this Section. The Square does have the advantage of being located a shorter distance to Carlow than Liffey Valley, Blanchardstown and Dundrum for example, however it is not considered that this would be a major determining factor in relation to visits to the Square by Carlow residents.

Swords Pavilions

Swords Pavilions is situated to the north of Dublin City and c.16km from the City Centre. Swords is the County Town of Fingal and is identified as a Level 2 'Major Town Centre' in the Retail Strategy for the Greater Dublin Area 2008-2016 . The shopping centre has been in operation since 2001.

Retail Facilities

The Shopping Centre offers over 80 shops, restaurants, cafés and a cinema complex. Anchor tenants include Dunnes Stores and Supervalu, with other retailers including Boots, Next, JD Sports and River Island. The combination of Main Street and the Pavilions Centre provides a good basis for further expansion and integration which can result in qualitative improvements.

Accessibility

The Pavilions Shopping Centre is situated c.100km north east of Carlow. The Centre is located on the Malahide Road just off the M1 Motorway. Although the Centre does not benefit from a significant street profile, it is located within walking distance of Main Street. The Centre provides over 2,000 car parking spaces at surface level and multi-storey.

Conclusion

Swords Pavilions is located a considerable distance from Carlow and the journey to it would, in actuality, only be practical by private car. Similar to The Square in Tallaght, it is not considered that Pavilions would have a distinctive retail offer that would attract residents from Carlow to the Centre.

Quantitative Assessment

7

Introduction

The preparation of a Retail Strategy provides an opportunity to quantitatively review the retail environment with the Retail Planning Guidelines requiring a broad assessment of the additional retail floorspace needed in a County over the lifetime of the Strategy. Therefore, this Section seeks to identify how the retail capacity will change over time, starting with a review and update of the floorspace capacity assessment as set out in the County Carlow Retail Strategy 2015.

The review will take into account changes to the population and forecasts/targets since the 2015 Strategy was published, with the quantitative assessment providing predicted capacity for additional retail floor space through the lifetime of the County Development Plan, 2022 – 2028. In addition to an assessment of the base year of 2021, the predicted capacities are provided for 2024 and 2028 which allow for a longer-term broad examination of potential retail floor space capacity.

Approach

The quantitative assessment is carried out through a step by step approach as set out below:

- Establish the Study Area.
- Estimation of the population for the 2021, 2024 and 2028 year assessments.
- Estimation of national per capita expenditure on convenience and comparison goods (bulky and non-bulky) for the 2021, 2024 and 2028 year assessments.
- Estimation of per capita expenditure on convenience and comparison goods (bulky and non-bulky) for the 2021, 2024 and 2028 year assessments for the counties in the Study Area – Carlow, Laois, Kilkenny, Kildare, Wexford and Wicklow adjusted to allow for regional/county variations.
- Estimation of total available expenditure for convenience and comparison goods (bulky and non-bulky) for the 2021, 2024 and 2028 year assessments adjusted for inflows and outflows based on household survey results.
- Estimation of current floorspace turnover per square metre (sqm.) for convenience and comparison goods (bulky and non-bulky).
- Estimation of the likely average floorspace turnover per square metre (sqm.) of new floorspace in convenience and comparison goods (bulky and non-bulky).
- Estimation of the level of available expenditure for the provision of additional floorspace.
- Estimation of the capacity for additional floorspace for the Study Area and County Carlow for the years 2021, 2024 and 2028.

Definition and Population of the Study Area

Establishing the Study Area

The Study Area was established following an analysis of the Household Survey 2015, the quantitative assessment in the previous Retail Strategy, the retail trends identified in Section 3, consideration of drivetimes and the gravity model. The resultant Study Area largely followed that identified in the 2015 Strategy with changes at the periphery to include additional electoral districts around established centres (e.g. Athy).

Within the study area the level 1, 2 and 3 centres, see Figure 7.1, have been assessed in terms of their localised catchment which is particularly relevant in the context of convenience shopping.

Map 7.1 identifies the overall study area and the aforementioned local catchments both within County Carlow and in adjoining counties where relevant.

Centres in Study Area
Carlow Town
Muine Bheag
Tullow
Athy
Hacketstown
Carrickduff (Bunclody)
Tinnahinch (& Graiguenamanagh)
Baltinglass
Ballon
Borris
Leighlinbridge
Rathvilly

Figure 7.1: Study Area

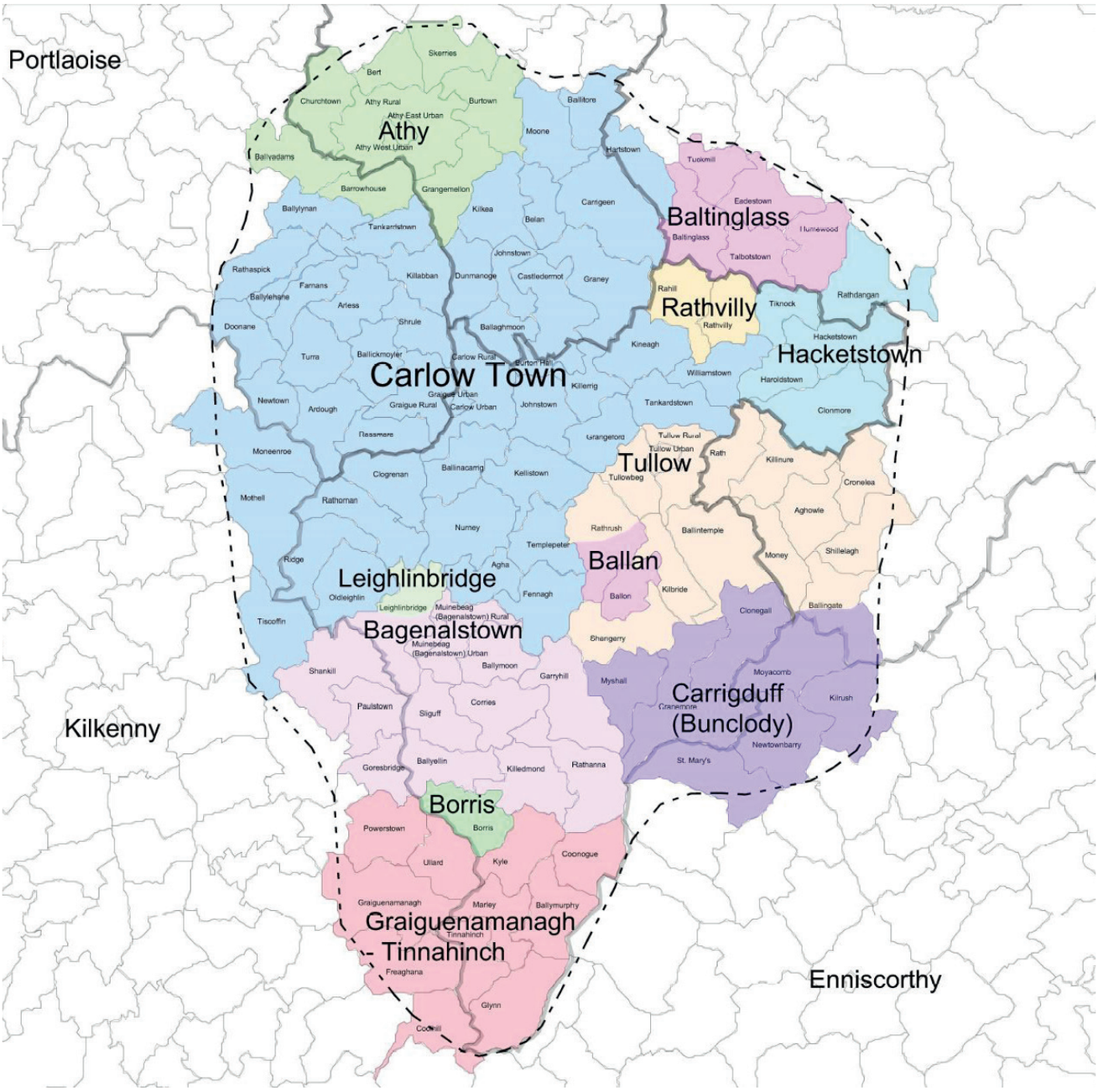
Study Area Population

The population was based on the 2016 Census results which gave a total study area population of 107,525 persons. A breakdown of the Population on a County basis is provided in Figure 7.2.

The 2016 Census population figures have been projected forward to establish the population for the assessment years of 2021, 2024 and 2028. The growth rates used for population projections are based on the population targets set out in the "Implementation Roadmap for the National Planning Framework", published by the Department of Housing, Planning and Local Government in July 2018, and the Regional Spatial and Economic Strategies (RSES) for the Southern and the Eastern and Midlands Regions. Figure 7.3 provides a breakdown of the populations for 2024 and 2028.

Area	Population 2016 (Study Area)
Carlow	56,932
Laois	12,160
Kilkenny	7,763
Kildare	19,275
Wexford	3,842
Wicklow	6,815
Total	**106,787**

Figure 7.2: Study Area Population 2016



Map 7.1: Study Area and Local Catchments

Area	Population 2016	Annual Growth 2018, 2021 & 2024	Annual Growth 2028	Population 2024	Population 2028
Carlow	56,932	1.01%	0.63%	61,686	63,254
Laois	12,160	1.07%	0.73%	13,242	13,635
Kilkenny	7,763	1.06%	0.81%	8,446	8,721
Kildare	19,275	1.33%	0.97%	21,429	22,268
Wexford	3,842	1.09%	0.77%	4,189	4,320
Wicklow	6,815	1.01%	0.81%	7,383	7,626
Totals	**106,787**			**116,374**	**119,824**

Figure 7.3: Study Area Population Projections (growth rates based on RSES range taking the high target)

Per Capita Expenditure

In order to calculate the available expenditure and evaluate the retail environment within the Study Area and the local catchment areas, it is necessary to firstly establish the national level per capita expenditure estimates for 2021, 2024 and 2028. In this regards, the estimates for the aforementioned years were:

- Convenience - €4,068 (2021), €4,025 (2024) and €4,189 (2028)
- Comparison (non – bulky) - €3,328 (2021), €3,453 (2024) and €3,652 (2028)
- Convenience (bulky) - €832 (2021), €863 (2024) and €913 (2028)

The per capita expenditure figures above are based on the Annual Services Enquiry (ASI) 2018 and have been regionally adjusted to take account of the likely different per capita expenditure levels across the Study Area. Figure 7.4 provides a breakdown of the different per capita expenditure figures used for the purpose of the quantitative assessment.

The County level adjustment was based on a review of relevant publications which include the County Incomes and Regional GDP 2015 through to 2017 and Household Budget Surveys 2015-2016.

The per capita expenditure was adjusted, prior to the County level breakdown, in line with the Consumer Price Index (CPI) and taking account of the Retail Sales Index (RSI) 2018 – 2020. The per capita expenditure was further adjusted having regard to levels of online sales as they relate to the Annual Service Inquiry 2018 and subsequent levels of online sales published by the Central Statistics Office (CSO) up until January 2021. In this regard, the role and impact of on-line sales during the Covid-19 Pandemic in 2020 and currently can be evidenced in Figure 7.5.

	Carlow	Laois	Kilkenny	Kildare	Wexford	Wicklow
Convenience 2018	€3,632.05	€3,695.71	€3,632.05	€4,160.18	€3,632.05	€4,160.18
Convenience 2021	€3,938.47	€4,007.51	€3,938.47	€4,511.16	€3,938.47	€4,511.16
Convenience 2024	€3,897.10	€3,965.42	€3,897.10	€4,463.78	€3,897.10	€4,463.78
Convenience 2028	€4,055.34	€4,126.43	€4,055.34	€4,645.03	€4,055.34	€4,645.03
Comparison - Non Bulky 2018	€3,106.02	€3,199.90	€3,041.64	€3,721.28	€2,985.79	€3,515.57
Comparison - Non Bulky 2021	€3,138.75	€2,970.56	€3,056.40	€3,475.15	€3,043.74	€3,327.74
Comparison - Non Bulky 2024	€3,256.85	€3,082.33	€3,171.40	€3,605.91	€3,158.26	€3,452.94
Comparison - Non Bulky 2028	€3,445.20	€3,260.59	€3,354.81	€3,814.44	€3,340.91	€3,652.63
Comparison - Bulky 2018	€776.50	€799.98	€760.41	€930.32	€746.45	€878.89
Comparison - Bulky 2021	€784.69	€742.64	€764.10	€868.79	€760.94	€831.93
Comparison - Bulky 2024	€814.21	€770.58	€792.85	€901.48	€789.57	€863.24
Comparison - Bulky 2028	€861.30	€815.15	€838.70	€953.61	€835.23	€913.16

Figure 7.4: County Level Per Capita Expenditure

The results set out in Figure 7.4 demonstrate the following in terms of trends and the impact of the Pandemic:

- The trend of moving towards online for the retail sale of books, newspapers, stationery and other goods (4753,4761 to 4765,4776 to 4778) has been consistent since 2018.
- During periods of strict Covid-19 lockdown the retail sale of textiles, clothing and footwear (4751,4771,4772) exceeded 60% online sales as a percentage of turnover but during the summer period of 2020, when restrictions were most relaxed, the level dropped back to approx. 7% to 8% which is only marginally above normal levels.
- In general, evidence suggests that comparison operators were reasonably well equipped to dealing with the need for a greater online presence during 2020 and while the figures provided in Figure 7.4 are a percentage of turnover, the actual performance of the compassion retail sector in 2020 was not as bad as anticipated. In this regard the Retail Sales Index for the NACES highlighted in Figure 7.4 reported a 1.69% increase in value and a 12.81% increase in volume in December 2020 against December 2019.
- There was an increase in the level of online sales for convenience shopping i.e. retail sale in non-specialised stores with food, beverages or tobacco predominating (4711), but it was not as significant as the comparison trade as supermarkets stayed open and the shift towards more grocery fulfilment centres is only being developed in the Irish retail sector currently, albeit a trend being fast-tracked by the Pandemic.

For the purpose of establishing the different per capita expenditure levels for bulky and non-bulky comparison goods, that portion of comparison expenditure relating to bulky goods (i.e. retail warehousing) was identified. In establishing per capita expenditure for bulky comparison goods, regard was had to the Household Budget Survey and the Annual Service Inquiry. In addition, the standard approach for retail assessments is to take approx. 20% of comparison expenditure and attribute it to bulky goods and this was the figure taken to provide an estimate for the assessment.

The growth rates used to project the per capita expenditure up to 2020 were informed by an assessment of the Annual Service Inquiry 2012 – 2018, specifically NACE 47 which identified trends in expenditure levels, and the Quarterly Economic Commentaries (ESRI). To arrive at the appropriate growth rates the Retail Sales Index was reviewed and highlighted growths of c.3% in value and c.4% in volume in 2019 for convenience shopping with the 2020 figures showing a sharp increase in both value and volume at c.13% and c.17% respectively. For comparison shopping the growth on 2019 was a c.4% increase in value and c.10% increase in volume while in 2020 the figures were c.2 % increase in value and c.13% increase in volume. The fact that comparison

	Dec-18	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19
Retail Sales in Non-Specialised Stores with Food, Beverages or tobacco predominating	1.8	1.7	1.9	1.8	1.7	1.7	1.8	2	1.6	1.8
Department Stores (4719)	4.6	4.1	3.1	3.8	3.4	3.6	4.2	3.6	3.1	3.8
Retail Sales of Food, Beverages or tobacco in specialised stores (4721-4729)	0.9	1.1	1.1	0.9	0.9	1	1	1.1	1.1	1.1
Retail Sales of Household Equipment (4741-4743, 4752, 4754, 4759)	5.8	3.7	4	5.3	4.7	3.5	5	6.3	6.1	6.3
Retail Sales of Textiles, Clothing an Footwear (4751, 4771, 4772)	5.4	6.5	5.7	5.6	6.3	6.5	5.6	5.7	4.9	5.2
Retail Sales of Books, Newspapers, Stationary & Other Goods ((4753, 4761-4765, 4776 to 4778)	21.3	20.8	20.8	12.8	18.6	20.5	20.7	20.7	20.8	21.4

Figure 7.4: Retail Turnover generated by Online Sales (%)

retailers could still achieve the aforementioned increases can be attributed to the performance of this component of the retail sector in terms of online sales as identified in Figure 8.4.

The Pandemic and shift towards working from home has contributed to a sharp increase in convenience expenditure with reports of significant increases in the spend on weekly grocery shops. This can be attributed to a number of factors such as:

- Higher frequency of shop visits as means of getting out during Covid-19 lockdowns
- Larger food shops as people spend more time at home where under normal circumstances they would be in a workplace and to varying extents meet their workday food needs in restaurants, cafés etc.
- The closure of restaurants and other food outlets resulting in the need for a larger food shop notwithstanding that the food outlets can still do home deliveries.

The result is the previously mentioned spike in growth from 2020 in convenience shopping but it is excepted that as people return to work, and there is a reduction in home working, that the level of trade will reduce back but still result in a relatively high average growth profile for convenience expenditure over the medium term. Therefore, for both convenience and comparison shopping the per capita expenditure figures have been projected forward at a conservative rate for differing reasons.

The average year on year growth rates used for comparison expenditure was just under 3% from 2018 to 2021, 2 % for the period 2021 – 2024 and 2 % for the period 2024 – 2028.

The average year on year growth rates used for convenience expenditure growth was just over 8% from 2018 to 2021, -1 % for the period 2021 – 2024 to take account of the need for a resumption of normal trading post-Pandemic and 2 % for the period 2024 – 2028. An analysis of retail sales in non-specialised stores (NACE 471) between 2012 - 2018 highlights periods of growth and retraction of consumer expenditure. Over the period the average growth was c. 1% with the peak being a c. 13% increase in 2016 nut this followed an c. 8% decrease in 2015. Therefore, the figures used are considered to be robust and appropriate per capita expenditure projections considering recent growth trends in private consumer expenditure and the expected general continuation of this growth.

Study Area Available Expenditure

By applying the population projections outlined in this Section to the per capita expenditure estimates across the Study Area, it is possible to estimate the available expenditure in the Study Area for 2021, 2024 and 2028 as set out in Figures 7.5, 7.6 and 7.7 for convenience, non-bulky comparison and bulky comparison goods.

Oct-19	Nov-19	Dec -19	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21
1.8	1.8	1.9	1.8	2	2.3	2.5	2.5	2.4	2.2	2.1	2.4	2.5	2.6	2.5	3.2
4.4	5.7	5	4.5	4.3	10.5	51.1	29.8	12.3	7.7	7	7.1	13.8	28.8	7.4	25.3
1.2	1.3	1.5	1.1	1.1	3	7.6	9.3	6.2	4.2	3.7	3.3	4.2	4.9	4.3	3.8
6.3	7.4	8.3	6.4	7.6	9.4	42.6	25.2	10.4	7.5	9.3	10	10.7	20.5	11.8	15
5.6	8	7.3	6.8	5.7	10.4	66.3	61.8	16.4	8.6	7.7	10.1	18.2	67.1	9.6	62.7
21.3	23.5	23.3	13.4	13.5	16.7	34.8	32.1	21.7	17	18.2	16.1	16.6	33.5	18.1	24.7

The identified available expenditure provides an estimate of the total expenditure of residents living within the identified Study Area in the assessment years in accordance with the population growth scenarios set out in the Regional Spatial and Economic Strategy (RSES) for the Southern and the Eastern and Midlands Regions. The figures take into account the recent economic disruptions caused by the Covid-19 Pandemic through the use of adjusted per capita expenditure estimates.

The available expenditure estimates were adjusted in accordance with the survey results from 2015 which *inter alia* identified 2% of convenience expenditure outflow, 13% of non-bulky comparison expenditure outflow and 3% bulky comparison expenditure outflow. It is considered that these levels of outflow are still applicable for the purposes of this Strategy as there has not been a significant change in the retail environment in the Study Area or the main competing centres.

	Available Expenditure Convenience			
	2018	2021	2024	2028
Total Study Area Population	109,106	112,681	116,374	119,824
Study Area Available Expenditure in Co. Carlow	€ 208,550,350	€ 233,037,846	€ 237,618,717	€ 253,527,100
Adjusted for Outflows from Co. Carlow	€ 204,379,343	€ 228,377,089	€ 232,866,343	€ 248,456,558
Study Area Available Expenditure outside Co. Carlow	€ 205,531,548	€ 230,761,202	€ 236,424,799	€ 254,507,647
Total Study Area Available Expenditure	**€ 409,910,891**	**€ 459,138,291**	**€ 469,291,142**	**€ 502,964,205**

Figure 7.5: Total Convenience Available Expenditure

	Available Expenditure Non-Bulky Comparison			
	2018	2021	2024	2028
Total Study Area Population	109,106	112,681	116,374	119,824
Study Area Available Expenditure in Co. Carlow	€ 178,123,053	€ 184,259,903	€ 197,020,412	€ 213,690,854
Adjusted for Outflows from Co. Carlow	€ 154,967,056	€ 160,306,115	€ 171,407,759	€ 185,911,043
Study Area Available Expenditure outside Co. Carlow	€ 178,274,119	€ 175,264,382	€ 188,309,672	€ 206,078,853
Total Study Area Available Expenditure	**€ 333,241,175**	**€ 335,570,497**	**€ 359,717,430**	**€ 391,989,897**

Figure 7.6: Total Non – Bulky Comparison Available Expenditure

	Available Expenditure Bulky Comparison			
	2018	2021	2024	2028
Total Study Area Population	109,106	112,681	116,374	119,824
Study Area Available Expenditure in Co. Carlow	€ 44,530,763	€ 46,064,976	€ 49,255,103	€ 53,422,714
Adjusted for Outflows from Co. Carlow	€ 43,194,840	€ 44,683,026	€ 47,777,450	€ 51,820,032
Study Area Available Expenditure outside Co. Carlow	€ 44,568,530	€ 43,816,096	€ 47,077,418	€ 51,519,713
Total Study Area Available Expenditure	**€ 87,763,370**	**€ 88,499,122**	**€ 94,854,868**	**€ 103,339,746**

Figure 7.7: Total Bulky Comparison Available Expenditure

Study Area – Existing Retail Floorspace

The existing retail floorspace within the Study Area was based on the floorspace survey undertaken as part of the previous Retail Strategy in 2015. This survey was reviewed and there was a need to clarify the survey information from the County Laois side of Carlow Town which resulted in the existing floorspace being updated with some additions.

In addition, following an analysis of the survey it was found there was a need to make amendments in relation to vacant floorspace, particularly with respect to bulky goods (i.e. retail warehousing). In particular, previously identified vacant floorspace which was excluded from the capacity assessments has now been occupied e.g. The Range in the Four Lakes Retail Park and Homesavers off Penny Lane. The floorspace update undertaken also highlighted certain vacant floorspace that may be occupied during the lifetime of the Retail Strategy (similar to The Range and Homesavers during the last Strategy), and therefore, certain assumptions needed to be made regarding the floorspace that:

- Could be used for convenience shopping
- Could be used for non-bulky comparison shopping
- Could be used for bulky comparison (i.e. retail warehousing) shopping
- Could be taken up by non -retail uses as part of shift towards an experiential Town Centre
- Could be used as part of 'last mile' delivery solutions
- Could be used for other economic activities (e.g. warehousing, logistics and light industrial)

Notwithstanding the above assumptions, there is still further bulky comparison floorspace (i.e. retail warehousing) accounted for in Figure 8.8 which due to its location, quality, accessible and adjacencies could be changed over the lifetime of this Retail Strategy to other uses such as general warehousing and logistics which would also support the overall retail and economic offer of County Carlow. The quantum of convenience, non – bulky comparison and bulky comparison floorspace within the study area and used for the purposes of the quantitative assessment is summarised in Figure 7.8.

Location	Convenience 2021 Net (sq.m)	Non-Bulky Comparison 2021 Net (sq.m)	Bulky Comparison 2021 Net (sq.m)
Carlow Town	12,569	27,060	35,689
Muine Bheag	2,546	2,533	5,518
Tullow	3,835	1,640	4,731
Athy	5,620	4,864	-
Hacketstown	955	100	1,500
Carrickduff (Bunclody)	3,123	1,905	300
Tinnahinch (& Graiguenamanagh)	2,578	1,010	-
Baltinglass	1,500	1,500	-
Ballon	270	50	100
Borris	380	40	-
Leighlinbridge	170	340	1,200
Rathvilly	110	60	150
Other	533	105	-
Total	**34,189**	**41,227**	**49,189**

Figure 7.8: Study Area – Existing Retail Floorspace

Turnover Estimates

Turnover Estimates – Existing Trading Floorspace

From the estimation of available expenditure and the update of floorspace survey information it is possible to establish a turnover ratio (€ per sq.m) for both convenience and comparison, both bulky and non – bulky floorspace (i.e. retail warehousing), in the Study Area. This is calculated by dividing the available expenditure for each type of goods by the associated existing retail floorspace and the results of this exercise are provided in Figure 7.9.

The turnover ratios in Figure 7.9 show the average turnover (€) per sq.m of overall existing floor space in the Study Area in 2021. Therefore, it does not take account of the significant differences in turnover for different retail operators. In general, it can be assumed that many outlets of national and international multiple shops are located within purpose-built shopping centres or at other prime locations. These shopping centres or high street town centre shops will invariably have substantially greater turnover per sq.m than shops which are less well located or situated in older, inefficient premises and/or are operated as independents. In particular, it is likely that smaller units and units outside the retail core of the town centre have lower turnover per sq.m than the averages identified.

An analysis of the figures in Figure 7.9 suggests that both the convenience and non – bulky comparison sectors are trading well with some overtrading and/or leakage occurring. However, for both convenience and non – bulky comparison retailing its likely that considering the type of floorspace generally, its location and accessibility, operator mix and established nature the retailing environment is performing well.

The results for bulky comparison floorspace (i.e. retail warehousing) suggests that there is a degree of under performance in the floorspace that is currently trading, but there has been a significant improvement from the Retail Strategy in 2015 (€2,166 per sq.m currently against €1,294 per sq.m in the 2015 Strategy). This can largely be accounted for by the growth in available expenditure outstripping the growth in new floorspace and possibly the repurposing of some bulky goods floorspace into other non – retail uses. This repurposing trend should continue, particularly for the current vacant floorspace as a lot of this space is more suitable for warehousing, light industrial and logistics uses due to its location, form, quality and ability to contribute to retail vitality and viability.

	Existing Turnover Ratios (€ per sq.m)		
	Convenience	Comparison Non-Bulky	Comparison Bulky
Available Expenditure 2021	€ 459,138,291	€ 335,570,497	€ 88,499,122
Total Floorspace	34,189	41,227	49,189
Less Vacant Floorspace	0	1,582	8,331
Trading Floorspace	34,189	39,645	40,858
Turnover per sq.m	**€ 13,429.35**	**€ 8,464.44**	**€ 2,166.03**

Figure 7.9: Existing Retail Floorspace – Turnover (€) per sqm.

Turnover Estimates – Assumed for Quantitative Assessment

As outlined previously turnover estimates differ from retailer to retailer depending on factors such as unit size, location and value of goods. The turnover ratios measure the relative efficiency with which floorspace is used by retailers and how their performance can convert the floorspace into retail turnover. The turnover estimates are used at two stages in the quantitative assessment as follows:

- To establish what the turnover of the floorspace should be under normal trading conditions (i.e. no overtrading or undertrading).
- To convert the available residual headroom expenditure at each of the forecast years into a need (or requirement) for additional retail floorspace.

In order to estimate what would be considered to be realistic turnover estimates, there is a need to consider the general characteristics of the differing nature of retail floorspace provided across the Study Area, the relative trading performance of the main retail centres, published data on store productivities of major retailers in Ireland and the turnover estimates adopted in other County and Regional Strategies. The assumed turnover per sq. estimates are set out in Figure 7.10.

Year	Assumed Turnover Ratios (€ per sq.m)		
	Convenience	Comparison Non-Bulky	Comparison Bulky
2021	€11,166	€6,182	€3,091
2024	€11,334	€6,369	€3,185
2028	€11,563	€6,628	€3,314

Figure 7.10: Retail Floorspace – Assumed Turnover (€) per sqm Estimates

Residual Available Expenditure and Floorspace Capacity

In order to establish the floorspace capacity, it is first necessary to determine residual available expenditure for convenience, bulky comparison and non-bulky comparison (i.e. retail warehousing) within the Study Area. Using the assumed turnover ratios in Figure 7.10 and applying them to the existing floorspace in Figure 7.8 it is possible to establish the average turnover (€) of floorspace under normal healthy trading conditions. This figure is then subtracted from the total available expenditure to give an estimate of the available expenditure for the provision of additional floorspace (i.e. the residual available expenditure) in 2021, 2024 and 2028.

The future residual available expenditure can be expressed in floorspace capacity terms by dividing by the average turnover (€) per sq.m. The results of this exercise for convenience, bulky comparison and non-bulky comparison i.e. retail warehousing within the Study Area are set out in Figures 7.11, 7.12 and 7.13.

	Available Expenditure Convenience		
	2021	2024	2028
Total Study Area Population	112,681	116,374	119,824
Study Area Available Expenditure in Co. Carlow	€ 233,037,846	€ 237,618,717	€ 253,527,100
Adjusted for Outflows from Co. Carlow	€ 228,377,089	€ 232,866,343	€ 248,456,558
Study Area Available Expenditure outside Co. Carlow	€ 230,761,202	€ 236,424,799	€ 254,507,647
Total Study Area Available Expenditure	**€ 459,138,291**	**€ 469,291,142**	**€ 502,964,205**
Study Area Floorspace Turnover (ave. normal sales density)	€ 375,798,869	€ 393,024,919	€ 400,944,568
Total Study Area Surplus/Deficit Available Expenditure	€ 83,339,423	€ 76,266,223	€ 102,019,637
Study Area Floorspace Capacity/Headroom (Sq.m)	**7,464**	**6,729**	**8,823**

Figure 7.11: Convenience - Residual Available Expenditure and Floorspace Capacity

The following provides a commentary and presents the key outcomes of the assessment set out in Figure 7.11:

- There is approximately €83m in expenditure available in 2021 which will reduce to approximately €76m in 2024 but subsequently it will rise back to approximately €102m in 2028.
- Capacity exists for additional convenience floorspace currently (c. 7,464 sq.m net) and in the assessment years 2024 (c. 6,729 sq.m net) and 2028 (c. 8,823 sq.m net).
- The assessment takes account of pipeline floorspace which is assumed to be trading by 2024, hence why there is no increase in capacity between 2021 and 2024.
- Taking into account the role and function of the centres within the Study Area, their place within their retail hierarchy and the existing distribution of convenience floorspace across the Study Area, the vast majority of future floorspace should be directed towards centres in County Carlow.

	Available Expenditure Non-Bulky Comparison		
	2021	2024	2028
Total Study Area Population	112,681	116,374	119,824
Study Area Available Expenditure in Co. Carlow	€ 184,259,903	€ 197,020,412	€ 213,690,854
Adjusted for Outflows from Co. Carlow	€ 160,306,115	€ 171,407,759	€ 185,911,043
Study Area Available Expenditure outside Co. Carlow	€ 175,264,382	€ 188,309,672	€ 206,078,853
Total Study Area Available Expenditure	**€ 335,570,497**	**€ 359,717,430**	**€ 391,989,897**
Study Area Floorspace Turnover (ave. normal sales density)	€ 254,208,970	€ 275,852,488	€ 287,053,205
Total Study Area Surplus/Deficit Available Expenditure	€ 81,361,527	€ 83,864,943	€ 104,936,692
Study Area Floorspace Capacity/Headroom (Sq.m)	**13,161**	**13,167**	**15,833**

Figure 7.12: Non – Bulky Comparison - Residual Available Expenditure and Floorspace Capacity

The following provides a commentary and presents the key outcomes of the assessment set out in Figure 7.12:

- There is approximately €81m in expenditure available in 2021 rising to approximately €84m by 2024 which will then reach a level of approximately €105m by 2028.
- Capacity exists for additional non- bulky comparison floorspace currently (c. 13,161 sq.m net) and in the assessment years 2024 (c. 13,167 sq.m net) and 2028 (c. 15,833 sq.m net).
- The assessment takes account of pipeline floorspace which is assumed to be trading by 2024, hence why the increase in capacity between 2021 and 2024 is negligible.
- As Carlow Town is the Level 1 Centre in the Study Area the majority of new non – bulky comparison floorspace should be located within its retail core area with other locations considered through the application of the sequential test.
- Where appropriate non – bulky comparison floorspace can be provided in other centres around the County if it can be demonstrated that it meets the retail objectives for each centre and should be assessed on a case by case basis.

	Available Expenditure Bulky Comparison		
	2021	2024	2028
Total Study Area Population	112,681	116,374	119,824
Study Area Available Expenditure in Co. Carlow	€ 46,064,976	€ 49,255,103	€ 53,422,714
Adjusted for Outflows from Co. Carlow	€ 44,683,026	€ 47,777,450	€ 51,820,032
Study Area Available Expenditure outside Co. Carlow	€ 43,816,096	€ 47,077,418	€ 51,519,713
Total Study Area Available Expenditure	**€ 88,499,122**	**€ 94,854,868**	**€ 103,339,746**
Study Area Floorspace Turnover (ave. normal sales density)	€ 152,037,535	€ 156,644,424	€ 163,004,816
Total Study Area Surplus/Deficit Available Expenditure	-€ 63,538,413	-€ 61,789,557	-€ 59,665,071
Study Area Floorspace Capacity/Headroom (Sq.m)	-20,557	-19,403	-18,005

Figure 7.13: Bulky Comparison - Residual Available Expenditure and Floorspace Capacity

The following provides a commentary and presents the key outcomes of the assessment set out in Figure 7.13:

- Similar to the findings of the Retail Strategy in 2015, there is currently an excess of bulky comparison floorspace in the Study Area which equates to an overprovision of approximately 20,557 sq.m.
- Even with growth in expenditure up until 2028 there is no capacity for additional bulky comparison floorspace.
- However, there is scope for some of this floorspace to be repurposed for uses such as warehousing, logistics and light industrial as in some instances the location and condition of the floorspace is not ideal for retail warehousing.
- Further to the above, while this quantitative assessment does not identify capacity it should be noted that the quality of this floorspace in Carlow is quite poor in places and badly located. In this context, it is not considered appropriate to make any floorspace allocation as part of this Retail Strategy. However, this should not preclude bulky comparison floorspace (i.e. retail warehousing) in instances where it can be can demonstrated that there will be a contribution to town centre vitality and viability due to its location, quality, accessibility and retail offer. There should also be an evidenced based approach to any new bulky comparison floorspace and all planning applications should include a full retail impact statement which addresses existing bulky comparison provision in the town including as appropriate any change of use of existing retail bulky comparison premises elsewhere within the town to other non-retail uses since the making of this Retail Strategy
- Current issues around bulky comparison floorspace are not unique to Carlow and this is a challenge faced in many locations around the Country. It's typically a legacy of the noughties (2000 -2009) and in order to address the situation, Local Authorities should be proactive in managing the transition of existing space which is no longer suitable while still considering new opportunities subject to assessment on a case by case basis.

The additional floorspace figures set out in this Section should not be considered as upper limits but rather indicative of the scale of new floorspace required to meet the needs of the existing and future population of County Carlow. Over the lifetime of this Retail Strategy certain existing floorspace may become outdated and replaced. In addition, retail trends such as those set out in Section 3 of this Strategy may place different demands on the retail floorspace, particularly in relation to the nature of the use. Therefore, monitoring and surveying of floorspace, analysis of expenditure patterns and reviews of retail trends should be carried out periodically and if appropriate the strategy should be updated to reflect a changing retail environment.

Retail Hierarchy and Floorspace Distribution

8

Introduction

The RPGs require that retail development must follow the settlement hierarchy of the State and that retail development should be appropriate to the scale and function of the settlement or part of the settlement in which it is located as designated by national and regional guidance.

The RPGs set out the national retail hierarchy in line with the settlement structure of the State, identifying broad tiers of urban development, see below. They also note that the specific retail functions provided by each tier overlap in many respects and that below Dublin, there are no clearly defined cut-off points between levels of the hierarchy.

1. Metropolitan
2. Regional
3. Sub-Regional
4. District Centres
5. Small Towns and Rural Areas
6. Local Shopping

The RPGs designate Carlow Town as a Sub-Regional centre within the national retail hierarchy stating that such centres perform important sub-regional retailing functions including the major national retailing chains. Development Plan policies need to protect the primacy and retail function of Carlow Town within the County Retail Hierarchy to ensure it retains its position in the national hierarchy.

The principle of a hierarchy of retail centres informs the consideration of zoning for retail developments in the Development Plan and is an essential component of the Retail Strategy. The Retail Strategy should thus ensure that policies and proposals are consistent with the RPGs, set out the hierarchy of centres and provide a strategy for the location of retail development.

In particular the RPGs state that Development Plans should:

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

This Retail Strategy provides a retail hierarchy for County Carlow in line with the above. In doing so it refers to the hierarchy contained in the existing Retail Strategy and reviews this having regard to the following:

- Current strategic guidance at a national, regional and county level
- The need to protect and enhance the importance of Carlow Town as the principal urban centre and retail destination in the County
- The need to protect the important more localised functions of the town centres in the County such as Tullow and Muine Bheag
- The distribution of future retail floorspace in line with the Core Strategy, settlement hierarchy and future distribution of population growth within the County
- The promotion and facilitation of sustainable forms of transport by locating future retailing in centres that are served by public transport, where possible and practicable
- The need to facilitate competitiveness and innovation in the retail industry

Retail Hierarchy for Co. Carlow

Level 1: Carlow County Town Centre - Carlow Town

Carlow Town remains the first tier in the retail hierarchy, being the principal urban centre in the County. In accordance with this role and function, the Town exhibits a number of higher order retail, service and specialist functions not found elsewhere in the County.

Carlow Town has a good range and choice of convenience and comparison shopping as well as cultural and entertainment facilities. The Town not only performs an important retail function for the entire County but beyond into counties Laois, Kildare, Kilkenny and Wicklow. This function and the draw of the Town was evident from the results of the Household Survey, see Section 4.

Carlow Town Centre should continue to be the prime focus for future retail development and in particular the development of high order comparison retail floorspace should be located here. All types of retail floorspace are considered to be appropriate within Carlow Town as a Level 1 Centre, specifically comparison floorspace that is centrally located.

Level 2: Sub County Town Centres - Tullow and Muine Bheag (Bagenalstown)

The second tier of the County Retail Hierarchy comprises the Sub County Town Centres of Tullow and Muine Bheag (Bagenalstown). These towns continue to provide an important service role in support of the Carlow Town as well as the villages throughout the County.

Sub County Town Centres provide a good range of convenience offer and a modest comparison offer and are generally characterised by a large convenience / comparison anchor, a range of mid to low order comparison outlets, local retail services, ancillary specialist convenience outlets, community and social facilities.

Both Tullow and Muine Bheag (Bagenalstown) are integral to the settlement structure of the County and they act as important service centres for their immediate and hinterland populations.

Retail expansion in these settlements should be in line with their planned population growth and should be focussed on the consolidation of existing retail cores and providing further key retail development in order to deliver enhanced choice and competition for consumers. It remains an objective to provide a greater diversity and range of retail uses in these Towns.

Level	Category	Place
Level 1	County Town Centre	Carlow Town
Level 2	Sub County Town Centres	• Muine Bheag (Bagenalstown) • Tullow
Level 3	Small Town	• Hacketstown • Rathvilly • Ballon • Borris • Leighlinbridge • Carrickduff • Tinnahinch
Level 4	All other Villages/Settlements	All smaller settlements/nodes

Figure 8.1: County Carlow Retail Hierarchy

Level 3: Small Towns

This level of the retail hierarchy includes a number of small towns within County Carlow as follows:

- Hacketstown
- Rathvilly
- Ballon
- Borris
- Leighlinbridge
- Carrickduff
- Tinnahinch

Level 3 small towns generally have a more limited retail role and function than those towns in Level 2. Retail representation is often limited to primarily convenience and service provision with very limited comparison offer, if any.

As with the Sub County Town Centres, retail expansion in these Small Towns should be in line with their planned population growth. Development within these Towns should continue to be encouraged to locate within the core retail areas in order to strengthen and consolidate the retail role and function of these centres.

Level 4: All other Villages/ Settlements

Level 4 of the retail hierarchy consists of all smaller settlements/nodes which will normally exist to serve localised residential areas. These accommodate small shops associated with petrol filling stations or post offices.

Level 4 centres function to provide important day to day shopping, top up shopping and retail service requirements. Such retail facilities provide a valuable local and walk in role and function to the local communities that they serve. Their role should continue to be supported.

Distribution of Floorspace Requirements

Introduction

The floorspace potential for County Carlow up to 2028 is identified in Section 7. This Section sets out how this floorspace is to be distributed between the individual centres in accordance with the retail hierarchy for the County.

Distribution of Convenience Floorspace

It is recommended that the distribution of new convenience floorspace within County Carlow is allocated generally in accordance with population growth and having regard to the existing quantum of development currently provided within each centre. Section 7 projects forward the 2016 Census population figures to establish the population for the assessment years of 2021, 2024 and 2028. The growth rates used for population projections are based on the population targets set out in the "Implementation Roadmap for the National Planning Framework", published by the Department of Housing, Planning and Local Government in July 2018, and the Regional Spatial and Economic Strategies (RSES) for the Southern and the Eastern and Midlands Regions. County Carlow is projected to have a population of 59,858 persons in 2021, 61,686 persons by 2024 and 63,254 by 2028 in line with the Core Strategy.

The Carlow County Development Plan 2022 - 2028 Core Strategy allocates 44% of the projected household growth to Carlow Town with the remaining 56% allocated to the remainder of the County. This Retail Strategy utilises this allocation ratio in the distribution of net convenience retail floorspace potential identified in Section 7. This is illustrated in Figure 8.2.

Figure 8.2 identifies the estimated quantum of net convenience floorspace available for distribution in 2028 with 3,882 sq.m for Carlow Town and 4,941 sq.m for the remainder of the County. These figures take into consideration the population targets, the nature and quantum of floorspace currently provided within centres and any pipeline floorspace. It should not be viewed as an upper limit but used as a general guide as to the scale of floorspace required to sustain the centres within County Carlow.

Carlow Town is currently well served by convenience floorspace provision, with the future distribution in the Town focused on improving the range and quality in and proximate to the retail core. In this regard, both this Strategy and Project Carlow 2040: A Vision for Regeneration identify a number of opportunity sites suitable for such retail development.

Within the remainder of the County the distribution of convenience floorspace will be in accordance with the retail hierarchy and the household allocations as set out within the Council's Core Strategy. The previous Retail Strategy in 2015 highlighted the discrepancy in terms of the choice of convenience retail outlets between the Level 2 Centres of Tullow and Muine Bheag.

Future Floorspace - Convenience 2021		
Net Future Floorspace 2028	8,823	
Area	Split	Net Floorspace
Carlow Town	44%	3,882
Remainder of County	56%	4,941

Figure 8.2: Future Floorspace - Convenience 2021

It was noted that Tullow had a Supervalu, Tesco, Lidl and Aldi while Muine Bheag was only served by an Aldi and Supervalu. However, Lidl has subsequently opened and while this will add to the choice within the Town there still exists further potential for convenience floorspace and both Tullow and Muine Bheag should be prioritised for new and improved convenience retailing.

It is noted that adjoining counties have centres within the Study Area but due to their scale, existing retail offer and peripheral locations at the edge of the Study Area, it is not considered that any significant floorspace should be allocated as part of this assessment.

Distribution of Non – Bulky Comparison Floorspace

The distribution of net non-bulky comparison floorspace differs from that of convenience, particularly the middle to higher order offer which should be primarily located in the Level 1 Centre of Carlow Town. It is important that vitality and viability of Carlow Town is supported, and future non-bulky comparison should be focused into the retail core area and with the possibility of edge of centre locations that can meet the sequential test.

The scale of floorspace to be directed to Carlow Town should largely follow its current allocation relative to the overall quantum of floorspace in the County. In this regard, when pipeline floor space is taken into consideration Carlow Town accounts for approximately 85% of comparison floor space within the County. Therefore, this Retail Strategy utilises this allocation ratio in the distribution of net non-bulky comparison retail floorspace potential identified in Section 7.

Future Floorspace - Non-Bulky Comparison 2021		
Net Future Floorspace 2028	15,833	
Area	Split	Net Floorspace
Carlow Town	85%	13,458
Remainder of County	15%	2,375

Figure 8.3: Future Floorspace - Non-Bulky Comparison 2021

As the Level 2 Centres for the County, Tullow and Muine Bheag would be the location for the majority of the floorspace allocated for the remainder of the County. The split for Carlow Town and the remainder of the County are identified in Figure 8.3.

Bulky Comparison Floorspace

Further to the above, while this quantitative assessment does not identify capacity it should be noted that the quality of this floorspace in Carlow is quite poor in places and badly located. In this context, it is not considered appropriate to make any floorspace allocation as part of this Retail Strategy. However, this should not preclude bulky comparison floorspace (i.e. retail warehousing) in instances where it can be can demonstrated that there will be a contribution to town centre vitality and viability due to its location, quality, accessibility and retail offer. There should also be an evidenced based approach to any new bulky comparison floorspace and all planning applications should include a full retail impact statement which addresses existing bulky comparison provision in the Town including as appropriate any change of use of existing retail bulky comparison premises elsewhere within the Town to other non-retail uses since the making of this Retail Strategy.

As outlined in Section 7 of this Retail Strategy there are issues with respect to the existing bulky comparison floorspace in terms of quality and location. Therefore, there will be opportunities to transition this floorspace to other non-retail uses over time and this will begin to address the capacity issue and support the case for more conforming bulky comparison floorspace at appropriate locations.

Conclusion

The distribution of future floorspace is in line with the County Carlow Core Strategy and identified retail hierarchy as set out in this Retail Strategy. The figures set out above are a guide for the scale of new floorspace required to meet the needs of existing and future population of the County. A number of potential opportunity sites for the development of convenience and comparison retailing in Carlow Town, Tullow and Muine Bheag are identified in Appendix A.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Ladies Fashion
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Policies and Actions

9

Policies & Objectives

Introduction

This Section contains the policies, objectives, actions and measures to be implemented to encourage and foster retail development in the principal towns in County Carlow.

While the development of retail facilities is largely dependant on market demand and retailer requirements, it is envisaged that the following guidance will not only help promote town centres as vibrant and attractive areas but will position centres to respond to the ever evolving retail sector by addressing emerging retail trends. In combination this will encourage and facilitate the growth and development of retail, retail service, professional service and other complementary land uses.

In addition to the retail policies and objectives this Section also outlines specific objectives for each of the key centres as well as specific actions and measures that should be pursued in order to deliver improvements to the retail offer and enhance Town Centre vitality and viability in key centres across Carlow.

Policies

Detailed opposite are a number of policies that will be implemented to facilitate and encourage retail development in County Carlow and improve town centres in the County. They have been informed by national guidance as well as the 'Retail Trends' identified in Section 3 and seek to position Carlow to respond to emerging and future changes in the retail sector, including those which have been accelerated due to the Covid-19 Pandemic.

Retail Policies

RP 1: Healthy Retail Environment
It is a Policy of the Council to facilitate a competitive and healthy retail environment by ensuring that future growth in retail floorspace responds to the identified retail hierarchy for the County.

RP 2: Core Retail Areas
It is a Policy of the Council to support and reinforce the role and function of the core retail areas through the application of the sequential approach in the consideration of retail proposals in line with the provisions of the Retail Planning Guidelines for Planning Authorities, 2012.

RP 3: Town Centre Development
It is a Policy of the Council to promote and encourage Town Centre development that is designed so as to promote and support 'placemaking'.

RP 4: Carlow Town Centre
It is a Policy of the Council to promote the enhancement of retail floorspace, primarily comparison goods, and town centre functions in Carlow Town to sustain its competitiveness and importance as the only Level 1 Centre within the County Retail Hierarchy.

RP 5: Main County Towns
It is a Policy of the Council to maintain and enhance the competitiveness of Carlow's main towns by facilitating the development of additional retail floorspace where such development will deliver improvements to the retail offering of the County.

RP 6: Smaller Towns and Villages
It is a Policy of the Council to facilitate and encourage the preservation, enhancement and adaptation of the retail function of smaller centres and villages around the County.

RP 7: Community Orientated Shopping

It is a Policy of the Council to embrace and encourage the emerging trend of community orientated shopping by supporting the vitality and viability of existing centres within County Carlow and their development as multifunctional places that provide a variety of uses to meet the needs of the community they serve.

RP 8: New Retail Development

It is a Policy of the Council to ensure that applications for new retail development shall accord with the retail policies of the Development Plan and are assessed in accordance with the provisions of the Retail Planning Guidelines for Planning Authorities, 2012.

RP 9: Inappropriate Retail Development

It is a Policy of the Council to prohibit significant new retail development that due to its scale and / or location would negatively impact, either individually or cumulatively, on the vitality and viability of existing town centres.

RP 10: Specialist/Tourist Related Retail

It is a Policy of the Council to work with local industries in the promotion of specialist and small scale tourist related retail outlets which will increase the potential to benefit from existing assets and attract event shoppers and tourists to the County.

RP 11: Vacancy

It is a Policy of the Council to encourage reductions in floorspace vacancy within Town Centres including the identification of alternative uses for existing vacant floorspace where appropriate.

RP 12: Information and Communication Technology (ICT)

It is a Policy of the Council to ensure that Town Centres stakeholders including retailers fully utilise all available ICT infrastructure to re-imagine the retail core experience, enhance its attractiveness and embrace technological advances.

RP 13: Placemaking

It is a Policy of the Council to put 'place' as a priority for town centres to create a memorable experience that goes beyond traditional shopping and seeks to combine elements of public realm, retail mix and curated events to create distinct experiences.

RP 14: Large Out of Town Retail Centres

There will be an explicit presumption against large out of town retail centres located adjacent or close to existing, new or planned national roads/motorways having regard to policy outlined in the Retail Planning Guidelines, 2012.

County Level Objectives

In support of these policies a number of objectives have also been developed which form part of the strategic policy framework guiding retail development in County Carlow to 2028. As with the policies, these objectives have been drafted in line with national planning guidance, specifically the provision of the Retail Planning Guidelines, 2012 as well as having regard to the 'Retail Trends' identified and discussed in Section 3 of this Strategy.

The objectives contained in this Strategy build on and refine those of the previous Retail Strategy, with the aim of supporting and enhancing the retail offering of County Carlow in a sustainable manner in order to ensure the continued vitality and viability of town centres.

Settlement Objectives

Building on the County level objectives, a number of settlement specific objectives are identified for the main urban centres within County Carlow i.e. Carlow Town, Tullow and Muine Bheag (Bagenalstown). These build on the settlement objectives outlined in the previous Retail Strategy and are informed by the findings and conclusions for the 'Household Survey, and 'Quantitative Assessment' contained in Sections 4 and 7 respectively of this Strategy. These are addressed in the following pages.

Specific Objectives for Small Town Centres/ Villages Centres

Carlow County Council recognises the importance and key functions that Level 3 and 4 Centres throughout the County play in the delivery of services to meet the day to day requirements of their catchment. While such centres generally contain limited convenience and service provision with very limited, if any, comparison offer they are a vital part of the settlement and retail hierarchy for the County and are integral to a healthy rural economy.

Such centres provide an effective and valuable service to the local community. The Planning Authority will support the provision of such local services and facilities in small towns and villages as part of the promotion and delivery of a healthy rural economy.

Retail development should be in accordance with the planned population growth of these centres and as with all centres within the County, should be focused on the Town/Village cores in order to strengthen and consolidate their retail role and function. General measures such as objectives to reduce vacancy levels, promote accessibility and enhance the public realm will also be key considerations for these centres.

County Level Objectives

RO 1: Opportunity Sites
Facilitate the promotion and development of key Town Centre opportunity sites, specifically those identified in this Strategy.

RO 2: Accessibility
Introduce measures to improve the accessibility of Town Centres including those that prioritise pedestrians and cyclists and where feasible separate pedestrian and cycle traffic from vehicular traffic.

RO 3: Vacancy
Promote the revitalisation of vacant and derelict properties/shop units including alternative or short term measures to improve their visual appearance.

RO 3: Derelict Sites
Encourage infill development and the redevelopment of derelict and obsolete sites.

RO 4: Public Realm
Promote ongoing environmental improvements and measures to enhance the public realm.

RO 5: Manage Non-Retail Uses
Prevent over-development of non-retail uses / lower order commercial uses that would detract from the vitality and viability of core retail areas, such as fast-food takeaways and betting offices, amusement arcades, casinos, vaping shops etc.

RO 6: Events and Festivals
Promote activities that enliven the Town Centre, and improve the mix of uses within it including festivals, events and street markets in each town.

RO 7: New Retail Development
Ensure that applicants for significant new retail development undertake a thorough assessment of the quality and suitability of existing and available floorspace in the County in the context of their proposals.

RO 8: Town Centre Living
Encourage the active use of the upper floors of retail and commercial premises in the Town Centre, including the 'living over the shop' initiative.

Carlow Town Objectives

CTO 1: Core Retail Area

The core retail area should form the primary focus and preferred location for new retail development. Within this area there is a need to reinstate the role and function of the traditional retail core of the Town which is centred on Tullow Street, Dublin Street, Potato Market and the future Barrack Street link.

CTO 2: Central Sites

Central opportunity sites, including those identified in Project Carlow 2040: A Vision for Regeneration, will be prioritised for development.

CTO 3: Pedestrian Accessibility

Opportunities for the enhancement of pedestrian permeability of the retail core should be considered in line with the recommendations of the walking strategy contained in Project Carlow 2040: A Vision for Regeneration, including improvements to the width and condition of existing footpaths, the implementation of safe crossings that reflect pedestrian desire lines and proposals to upgrade junction arrangements to reduce delays to pedestrians.

CTO 4: Cycle Facilities

Opportunities to improve cycle infrastructure and accessibility to the retail core should be considered in line with the recommendations of the cycling strategy contained in Project Carlow 2040: A Vision for Regeneration, specifically the creation of an ambient environment in the Town Centre favourable to cycling on street (through reduced traffic speeds and volumes) and the delivery of a series of green routes within the Town.

CTO 5: Project Carlow 2040: A Vision for Regeneration

Implementation of the proposals contained in Project Carlow 2040: A Vision for Regeneration should be prioritised with particular focus on improvements to health and wellbeing through the built environment, placemaking, public realm improvements, sustainability, accessibility, heritage, natural assets such as the River Barrow and intervention areas.

CTO 6: Public Realm

The public realm upgrades to Tullow Street in recent years have enhanced the appearance of the Street. Further public realm upgrades should be encouraged within the Town Centre, particularly along Dublin Street which would benefit from enhanced landscaping and pavement improvements. The provision of street furniture such as benches, and the delivery of the 30km/hr zone will enhance the experience, safety and comfort of pedestrians living in, studying, working and visiting Carlow Town.

CTO 7: Car Parking

In line with Project Carlow 2040: A Vision for Regeneration and the stated aim to meet much of the future demand for travel by sustainable modes, it is not envisage that additional public parking will be required in the Town Centre. Future parking tariff rates for both short and long stay users will be reviewed in tandem with the fare prices for the urban bus service as per the guidance of Project Carlow 2040, A Vision for Regeneration.

CTO 8: Electric Vehicles

The provision of on-street and off-street electric vehicle (EV) recharging facilities with an appropriate mix of rapid charging facilities should be delivered in line with the Development Plan Parking Standards in line with the recommendations of Project Carlow 2040: A Vision for Regeneration.

CTO 9: Multifunctional

Support the multifunctional role of Carlow Town Centre including the provision of uses such as cafes, recreational and leisure facilities, restaurants and other complementary uses that not only meet the needs of existing and future residents but which also make the Town Centre attractive to visitors and tourists alike.

Tullow Objectives

TO 1: Core Retail Area
The core retail area should form the primary focus and preferred location for new retail development. Within this area additional retail, particularity comparison retail, will be encouraged. Uses that do not reinforce the vitality and viability of the Town Centre will be discouraged.

TO 2: Central Sites
Central opportunity sites, as set out in this Retail Strategy, will be prioritised for development.

TO 3: Market Square
Promote the utilisation of Market Square as a multifunctional space including its use for a local farmer's market and other community/civic functions.

TO 4: Pedestrian Accessibility
Improvements to the pedestrian linkages across the Slaney Bridge have enhanced connectivity between the Town Centre and the secondary retail core to the south west. Further improvements to pedestrian infrastructure and pedestrian priority, specifically the enhancement of the pedestrian environment within Market Square, is to be investigated and encouraged.

TO 5: Cycle Facilities
Opportunities to improve cycle infrastructure and accessibility to the retail core should be promoted. Cycle infrastructure should be considered in the delivery of new developments within the wider Town area and these should integrate with the Town Centre infrastructure.

TO 6: Public Realm
Public realm upgrades should be encouraged within the Town Centre, particularly in Market Square, which would benefit from enhanced hard and soft landscaping, pavement improvements, street furniture and lighting.

TO 7: Car Parking
Adopt a car parking management strategy for the Town Centre that reduces the presence of on-street car parking in favour of off-street car parking, including the promotion of backland parking areas.

TO 8: Electric Vehicles
The provision of on-street and off-street electric vehicle (EV) recharging facilities should be delivered in line with the Development Plan Parking Standards.

TO 9: Multifunctional
Support the ever growing importance of the multifunctional role of Town Centres including the provision of uses such as cafés, recreational and leisure facilities, restaurants and other complementary uses that not only meet the needs of existing and future residents but which also make the Town Centre attractive to visitors and tourists alike.

TO 10: Niche Retail Opportunities
Encourage and facilitate local niche industries, to develop a presence in the Town Centre to contribute to and benefit from existing assets and attract event shoppers and tourists to the Town.

Muine Bheag Objectives

MBO 1: Core Retail Area

The core retail area should form the primary focus and preferred location for new retail development. Within this area additional retail, particularity comparison retail, as well as other complementary uses such as cafés, recreational and leisure facilities and restaurants will be encouraged to reinforce the multifunctional role of the Town Centre.

MBO 2: Central Sites

Central opportunity sites, as set out in this Retail Strategy, will be prioritised for development.

MBO 3: Market Square

Encourage the utilisation of Market Square as a multifunctional space including its use for a local farmer's market and other community/civic functions. Improvements to the public realm of the Square, including paving and hard landscaping that is consistent with the architectural heritage of the Town Centre should be promoted.

MBO 4: Pedestrian Accessibility

Improvements to pedestrian infrastructure and pedestrian priority within the Town Centre should be encouraged, including enhanced pedestrian crossing facilities. New, as well as improved pedestrian linkages to the River Barrow are to be investigated and encouraged.

MBO 5: Cycle Facilities

Opportunities to improve cycle infrastructure and accessibility to the retail core should be promoted. Cycle infrastructure should be considered in the delivery of new developments within the wider Town area and these should integrate with the Town Centre infrastructure.

MBO 6 : Public Realm

Public realm improvements should be encouraged within the Town Centre, including enhanced hard and soft landscaping, pavement improvements, street furniture and lighting. Particularly the key connecting routes to the quays including Singletons Lane and Barrow Lane would benefit from urban realm improvements.

MBO 7: River Barrow

Promote the enhancement of the public realm along the River Barrow, including appropriate hard and soft landscaping that integrates with and is legible as part of the public realm of the Town Centre.

MBO 8: Signage

Enhanced signage between the Town Centre and the River Barrow should be promoted and encouraged.

MBO 9: Car Parking

Adopt a car parking management strategy for the Town Centre that reduces the presence of on-street car parking in favour of off-street car parking, including the promotion of backland parking areas. The feasibility of relocating car parking from Market Square elsewhere should be investigated.

MBO 10 Electric Vehicles

The provision of on-street and off-street electric vehicle (EV) recharging facilities should be delivered in line with the Development Plan Parking Standards.

MBO 11: Niche Retail Opportunities

Encourage and facilitate local niche industries to develop a presence in the Town Centre to contribute to and benefit from existing assets and attract event shoppers and tourists to the Town.

Actions to Promote the Town Centre

Promote Town Centre Living

Traditionally our Town/Village centres were not only service centres but also centres of a resident community. The loss of Town Centre living, particularly in rural counties such as Carlow, had a severe negative impact on the vitality and viability of Towns resulting in business closures, vacancy, dereliction and a reliance on private cars to access basic services.

With the ever growing concern regarding our climate, there is a move towards a more sustainable way of living and in turn a renewed focus on Town Centre living. This move is directly supported by the NPF, a key goal of which, and one of its NSOs, is the delivery of compact growth. Compact growth will be delivered in County Carlow through the promotion of living in existing urban areas and settlements. Concentrating growth in this manner is not only a fundamental requirement of delivering sustainable development in the long term but it is required to achieve the critical mass of population needed to support additional retail facilities and services, especially in more rural, peripheral areas of the County.

In accordance with the NPF, residential development will in the first instance be promoted in the centres of Carlow Town, Muine Bheag and Tullow. Specifically in relation to Carlow Town, Project Carlow 2040: A Vision for Regeneration, identifies intervention areas within the Town Centre that can accommodate and will be promoted for the delivery of residential dwellings and the creation of new residential quarters.

Promoting Town Centre living will bring people back into the Town/Village Centre where there are facilities, services, amenities and where they are generally proximate to employment. This in turn brings a renewed sense of vitality and viability to a place as people choose to stay local and are less reliant on cars as the primary mode of transport. The ability to support a range of services and facilities locally will also ensure that Carlow is positioned to take full advantage of the emerging Community Orientated Shopping trend discussed in Section 3 of this Retail Strategy. This trend, more than any other, has the potential to revitalise Town/Village Centres, by not only supporting existing businesses, specifically in the smaller settlements, but by encouraging new business to meet a renewed local demand which in turn could have significant positive impacts on vacancy levels throughout the County.

Develop and Promote Key Town Centre Opportunity Sites

This Strategy reviews and updates the opportunity sites identified in the previous Retail Strategy for Carlow Town, Tullow and Muine Bheag. All sites are located within the designated retail core areas, including backland areas, and present the opportunity to consolidate the Town Centre and promote and develop their role and function.

The location rather than the precise boundary of the sites have been identified by this Strategy as it is recognised that town centre sites in many instances form part of a tight urban grain and can entail complex assembly issues. In addition, the sites identified in Carlow Town are those concentrated in the Core Retail Area only. Other opportunity sites have been identified by Project Carlow 2040: A Vision for Regeneration and their delivery as intervention areas within the Town will be complemented by the opportunity sites identified in this Strategy.

It is recognised that Tullow and Muine Bheag already have a good convenience retail offer, accommodating most of the multiples. While a desirable addition, comparison retail should be provided in line with the Level 2 status of these centres. The opportunity for Town Centre sites in these settlements will thus lie not just with the provision of additional retail but with the delivery of a range of complementary uses that achieve multifunctional places.

The identified opportunity sites will thus be important not only in positioning Tullow and Muine Bheag to take advantage of the emerging community orientated shopping trend discussed in Section 3 of this Strategy but their potential development as locations for niche retailing could also promote and facilitate experiential retailing. Such an expansion of the offer of these centres is considered to be central to their future success and attraction in an ever changing retail environment.

The Council will encourage and support the appropriate development of key town centre sites.

Revitalisation of Vacant and Derelict Buildings

As set out in Section 5, all Level 1, 2 and 3 Settlements within Carlow, have to some degree, a level of vacancy and/or dereliction within their Town Centres. This may be attributable to a number of factors, ranging from a lack of recovery from the previous economic downturn in 2008, to a shortage of people within the town/village to sustain an enhanced retail and service offer. On the high-street, vacancy may also be attributed to the growth in on-line shopping. While the impact of the Covid-19 Pandemic and the associated lockdowns and closures of non-essential retail on vacancy is as yet unknown, it is likely to result in some closures and in turn an increase in vacancy levels, specifically in the larger Towns where there is a comparison retail offer.

Vacant and derelict units not only adversely impact the vitality and viability of town/village centres but in most instances they also have a negative impact on their visual appearance and in turn their attraction to both consumers as well as businesses. A concentration of vacant units in an area can give the overall impression of dereliction, for example the western end of Tullow Street in Carlow Town Centre. Such an impression can have far ranging negative impacts for the wider Town.

The Council will actively encourage the re-development and re-use of vacant and derelict properties. For example Project Carlow 2040: A Vision for Regeneration, supports the regeneration of a number of existing underutilised/vacant sites strategically located within the Town Centre, identifying that their development not only provides the opportunity to deliver new uses such as employment, community, and residential, but to enhance permeability within the Town, link uses and spaces and create a definable Town Core[44].

Across the County the Council will support:

- Proposals that, in the first instance, seek to re-use vacant/derelict buildings in the Town Centre and bring them back into active use on a 'long term' basis.
- The use of empty units, on a temporary basis, as spaces to promote cultural and community events i.e. pop-up shops for artists, local community groups etc. and for other pop-up uses such as restaurants and cafes.
- The visual enhancement of vacant/derelict units through the treatment of empty windows so they become an attraction rather than an eyesore or other measures such as painting to improve their visual appearance including short or interim measures.
- Innovation and creativity in relation to the use of vacant buildings and derelict sites for different public activities and events where appropriate e.g. pop up parks.
- A co-ordinated programme for building maintenance and development, as well as the identification of specific buildings and sites that need to be targeted immediately in the County.

The Council will also promote, provide and avail of incentive schemes with a focus on addressing the issue of vacancy and dereliction. Schemes such as the 'Repair and Leasing Scheme' under Rebuilding Ireland is a national level support to assist property owners in bringing vacant properties back into use. Other Schemes such as the 'Restart Grant Plus Scheme', which gives grants to businesses to help them reopen following national lockdown, and act to try and minimise the impact of the Pandemic on vacancy levels will also be supported.

Regulatory Guidance

The Council acknowledges that bringing vacant and/or derelict units back Into active use can be challenging in a regulatory context. Most works to or use of such buildings will have legal and/or planning implications including *inter alia* the requirement for planning permission, liability in terms of business rates and requirements to comply with first safety and disability access. These challenges often deter owners from pursuing new uses for such buildings or can in fact make uses such as living over the shop unviable.

In this regard the Council will seek to provide simple and straightforward information on the consents that may be required. Initiatives such as a presumption against development contributions on change of use applications where they relate to vacant premises or exemptions from the payment of levies and development contributions should also be considered for the redevelopment of vacant/derelict premises. These are matters which would be subject to other processes and considered as part of same, e.g.. Development Contribution Scheme.

Enhance the Public Realm

The creation and maintenance of a high quality, safe, attractive and healthy public realm is more important than ever before. While the public realm remains essential to the achievement of thriving, vibrant, sustainable and attractive Town Centres that everyone can enjoy and take pride in, on foot of the Covid-19 Pandemic the public realm has also become central to people's health and well-being as people seek to spend time outdoors but close to home.

Outdoor seating that allows people to spend time and enjoy the ambiance of the town/village is an important element of the public realm and is central to the cafe culture. The Council will support the appropriate siting and design of such furniture having regard to its visual appearance, the creation of high quality, cohesive public realms and universal access.

Building on work already completed to date, the Council will be proactive in supporting public realm initiatives in a post-Covid society, continuing to promote and encourage on-going environmental improvements to the public realm, as well as improved public realm spaces in the key urban centres in the County. Project Carlow 2040: A Vision for Regeneration has a central role to play in delivering this for Carlow Town and positioning it for the future.

Design and Shopfront Guidance

Traditional shopfronts and signage are important contributors to the character and visual attraction of town centres. The Council will continue to support and promote traditional signage, lettering and use of the Irish Language in signage for most shopfronts.

The Development Plan should include advice regarding appropriate shop front design, signage and advertising including policies that seek to retain traditional shop fronts. The Council supports the implementation of the 'Shopfront Upgrade Scheme' in order to enhance the streetscape environment of Carlow Town Centre by encouraging and supporting owners of local retail and commercial premises to improve their individual shopfronts. Similar schemes should be considered for other settlements throughout the County.

There will be a presumption against inappropriate shop front design and strict enforcement for unsympathetic and unauthorised signage and shop front fascia.

Promote Combined Niche Retailing, Local Industries and Tourism

New retail development within County Carlow will be delivered in line with the Retail Hierarchy, set out in Section 8 of this Strategy. Centres may compete within their tier of the retail hierarchy but often there is limited offer or attractions setting them apart from each other or adjacent Centres in other Counties.

Building on the work undertaken and recommendations made in the Town and Village Health Checks, 2017 and the Town and Village Key Project Plans for Tullow and Muine Bheag (Bagenalstown), 2018, this Strategy promotes niche retailing. Specifically niche retail that works with and utilises the existing unique assets and attributes of an area is promoted as both an integral part of the Town Centre retail offer as well as a tourism attraction.

Towns such as Tullow and Muine Bheag, are examples of where retail, local industries and tourism could be brought together to the benefit of the Town, the industries themselves, as well as a range of other service providers. Both Tullow and Muine Bheag have local industries that have organically developed close to the Town and present opportunities to deliver synergies with the Town Centre. For example a chocolate shop or chocolate experience cafe in Tullow would deliver a larger market to the producer, enhance the offer for the Town and act as a unique tourism attraction.

This type of 'experiential retailing' within a Town will help distinguish it as a place and in turn enhance its attraction as a tourist destination. This in turn will bring more people to the Town and attract more visitors to the industry that the Town becomes synonymous with e.g. breweries and distilleries in Muine Bheag.

The opportunity for such niche retailing and the delivery of experiential retailing within County Carlow, and specifically the more peripheral Towns/ Villages, should be investigated and facilitated as a means of promoting the vitality, viability and attraction of such centres.

Evening and Night Time Economy

A diverse, vibrant and sustainable night-time economy is an important part of any Town Centre and its vitality and viability. It has become even more important as how people shop changes, with the combination of retail and hospitality at the heart of experiential retailing and the renewed interest in and attraction of Town Centres.

The Council will encourage the delivery of multifunctional Town Centres through the development of mixed-use schemes and the locating of complementary uses in and adjacent to core retail areas. In this regard the integration of retail, leisure, restaurants and bars is essential not only to the promotion of a vibrant evening and night time economy but in attracting and retaining tourists who will want places to go and things to do in the evenings and at night.

Festivals, Events and Street Markets

Festivals, events and markets are not only important in enhancing the attractiveness of town centres as places to visit but in many instances they are part of the history of a settlement and are central to maintaining a link to the past. Many of the towns/ villages in Carlow traditionally performed a market town function, with their town centres focused on a market space/square.

Markets that allow people to purchase locally grown or produced goods have gained in popularity and are now an important component of the retail offer of most Town Centres. Such markets attract increased levels of footfall, improve the vitality and viability of Town Centres and contribute to the overall 'experience' of the Town. They also act as tourist attractions, especially where they showcase and become known for their representation of local niche industries and business.

Market spaces should also be viewed as multi-functional with the potential to accommodate fairs, festivals and events year-round. Such one off and/or yearly events are an important element of the tourist offer of Irish towns and should be investigated further in County Carlow in the context of the history and character of many of its villages e.g. the unique heritage of Borris in terms of Borris House and estate and its viaduct. Events that attract tourists will also have positive economic spin-offs for retail, commercial and service operators within these towns/villages.

The Council will continue to support and encourage such events, markets and festivals. In this regard Carlow County Council are currently in the process of developing a covered open space in the centre of Carlow Town at Potato Market, in the old Tully's Yard, called 'The Carlow Exchange'. The Carlow Exchange will become a key focal space in Carlow Town Centre for exchange of information, culture, ideas and will become an economic and social hub, and could become a place to host public events, tell stories, share ideas and could be used to display architectural models, drawings, maps, photographs. The purpose of the project is to protect and enhance the vitality and vibrancy of the Town Centre and to provide for and improve cultural, tourism, public facilities, amenity and other uses appropriate to the centre of a developing urban core.

Criteria for Assessing Future Retail Development

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Criteria for Assessing Future Retail Development

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Criteria for Assessing Future Retail Development

Introduction

This Section reviews and updates the assessment criteria set out in the previous Retail Strategy with the aim of providing policy recommendations regarding the assessment of future planning applications for retail development. As the 'Guidelines for Planning Authorities Retail Planning, 2012' (Retail Planning Guidelines) remain the relevant national level retail planning policy document much of the guidance provided below has remained unchanged from the previous Retail Strategy.

Assessment Criteria

Following is a list of criteria against which applications for significant retail development should be assessed. While it is acknowledged that it may not be viable for all applications for new retail development to comply with all criteria, national level policy guidance as well as the detailed guidance set out in Section 7 of this Strategy should be complied with in all instances.

The Sequential Test

Applications for new retail development should in the first instance seek to comply with the policies and objectives of the Development Plan and this Retail Strategy, specifically in terms of locating in and supporting the Town Centre. Where this is not the case such applications must be subject to the Sequential Approach and its policy principles and order of priority. The application of the sequential approach in the locating of new retail developments is central to the protection of the vitality and viability of Town Centres.

The sequential approach, its policy principles and application, are set out in detail in the Retail Planning Guidelines. In brief the Guidelines state that sequential development means that:

"1. The overall preferred location for new retail development is within city and town centres. Retail development may also be appropriate within District Centres identified in the settlement hierarchy at a scale appropriate to the needs of the area.
2. Subject to the requirements [below], only where the applicant can demonstrate, and the planning authority is satisfied, that there are no sites or potential sites within a city, town centre or designated district centre should an edge-of-centre site be considered. In addition, only in exceptional circumstances where it can be demonstrated that there are no sites or potential sites available either within the centre or on the edge of these centres should an out-of-centre site be considered[45]."

The Guidelines set out a clear order of priority in relation to the locating of retail development in line with the sequential test, seeking in the first instance to locate such development in city/town/district centre. Only where it can be demonstrated to the satisfaction of the planning authority that there are no sites which are (a) suitable (b) available and (c) viable in the centre should an edge of centre be considered. Out of centre site will only be considered in exceptional circumstances where it can be demonstrated that there are no available sites or potential sites in the centre or at the edge of centre.

In relation to whether sites can demonstrate suitability, availability and viability, the Retail Planning Guidelines set out the following criteria which should be taken into account in implementing the sequential approach[46]:

- **Suitability -** Is it consistent with development plan objectives, in particular zoning objectives, current land use activity in the vicinity of the site, size, capacity to accommodate development, traffic and transportation issues; and/or;
- **Availability -** This criterion relates to site ownership, ease of assembly and timing. Sites must be genuinely available for development at the time that site acquisition/ assembly begins or within a reasonable time-frame; and/or;

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

While the Retail Planning Guidelines are clear on the importance of the Sequential Approach and provide detailed guidance on its application, the Guidelines also note that:

"*The application of the sequential approach requires flexibility and realism on the part of both retail developers and planning authorities, to ensure that the various forms of retailing are developed in the most appropriate locations*[47]."

All applications for retail developments should be subject to the sequential test as set out in full in the Retail Planning Guidelines. Consideration should be given to existing vacant and derelict properties and extant permissions when preparing the sequential test. The Planning Authority should also have regard to the format and scale of the retail development proposed when applying the sequential test approach.

Retail Impact Statements

A Retail Impact Statement provides an assessment of the potential impact a proposed retail development would have on existing centres, retail trade and the retail environment. Such assessments are required where the planning authority considers an application for a new retail development to be particularly large in scale compared to the existing city/town/district centre, or where a proposed development absorbs on one site the bulk of the identified potential retail floorspace for a settlement. The purpose of such assessments is to promote healthy urban centres in the public interest.

Retail Impact Assessments (RIA) shall be prepared in accordance with the provisions and requirements of the Retail Planning Guidelines, specifically Annex 5. The threshold at which an RIA will be required for both comparison and convenience type development in County Carlow are as follows:

- **Greater than 1,000 sq.m of net floorspace in the three key towns of Carlow Town, Tullow and Muine Bheag**
- **Greater than 500 sq.m in the other settlements**
- **Or where Carlow County Council considers the development may impact on the vitality and viability of a town centre.**

In addition to the above, the Planning Authority may determine that an RIA is required as part of pre-application discussions or in the course of determining the planning application.

The Retail Planning Guidelines set out a list of criteria which be addressed to demonstrate whether or not the proposal would[48]:

- Support the long-term strategy for city/town centres as established in the retail strategy/ development plan, and not materially diminish the prospect of attracting private sector investment into one or more such centres;
- Have the potential to increase employment opportunities and promote economic regeneration;
- Have the potential to increase competition within the area and thereby attract further consumers to the area;
- Respond to consumer demand for its retail offering and not diminish the range of activities and services that an urban centre can support;
- Cause an adverse impact on one or more city/ town centres, either singly or cumulatively with recent developments or other outstanding planning permissions (which have a realistic prospect of implementation) sufficient to undermine the quality of the centre or its wider function in the promotion and encouragement of the arts, culture, leisure, public realm function of the town centre critical to the economic and social life of the community;
- Cause an increase in the number of vacant properties in the primary retail area 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.

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

- That there is a quantitative and qualitative need for the development.
- An assessment of existing "pipeline" floorspace which may exist within a particular centre.
- An assessment of the quality, location and suitability of the existing vacant floorspace having regard to existing unimplemented permission and the extent of vacant floorspace.
- The contribution of the development towards the improvement of the city/town/district centre in terms of urban design.
- The contribution of the development towards site or area regeneration.
- The role of the development in improving the competitiveness of the centre against other competing centres.
- Compliance with development plan policies and objectives.
- The development is easily accessible by the elderly and disabled/mobility impaired.

When proposing a retail development in any centre in the County, the applicant will be required to demonstrate the following in the Retail Impact Assessment:

- **That the floorspace proposed is appropriate having regard to the quantum and location of floorspace required in that centre.**
- **That the Retail Impact Assessment has been based on an appropriate catchment area.**
- **That the RIS has taken account of extant permissions and their likelihood of being implemented.**
- **That the RIS has considered the extent and nature of existing vacant floorspace and its suitability for the type and scale of retail facility proposed.**

The quantitative need for the quantum of floorspace will not be the only deciding factor. The Council will also consider whether any given planning application will be better located sequentially than permitted developments or whether it would be required for qualitative reasons such as strengthening the retail profile of a particular centre in accordance with its role within the retail hierarchy.

Quality in Design

The Retail Planning Guidelines are accompanied by a Retail Design Manual, 2012. The Manual sets out to provide planning authorities, developers and designers with evidence-based quality principles to ensure that future planning for the retail sector is focused on the creation of vibrant, quality places[49].

The Retail Design Manual is intended, firstly, to guide planning authorities in formulating appropriate design policies and development management responses in planning for the continued development of the retail sector and, secondly, to provide developers, designers and retailers with evidence-based quality principles to ensure that new retail development plays its part in realising quality outcomes in relation to urban design, and in renewing, consolidating and strengthening city and town centres as attractive, inclusive and durable places for people to live, work, shop or visit.

The Planning Authority will consult the Retail Design Manual, and refer applicants to same where required, when considering applications for new retail developments.

Traffic and Transport Assessments

A Traffic and Transport Assessment (TTA), as set out in the Traffic Management Guidelines, 2003 and the Traffic Transport Assessment Guidelines, 2014 will be required for retail developments in excess of 1,000 sq.m in line with the recommended thresholds provided in Table 2.1 of the Traffic Transport Assessment Guidelines.

A TTA is a comprehensive review of all the potential transport impacts of a proposed development or re-development, with an agreed plan to mitigate any adverse consequences[50]. A TTA should include a full and detailed assessment of how the trips to and from the development might affect the transport network. The assessment should be an impartial description of the impacts of the proposed development and should outline both its positive and negative aspects[51]. A TTA is also important in demonstrating how to encourage a modal shift to more sustainable travel options.

Applicants for retail development in excess of the stated threshold should consult the Traffic Management Guidelines, 2003 and the Traffic Transport Assessment Guidelines, 2014 prior to lodging a planning application. In addition to the thresholds stated in Table 2.1 and 2.2 of the Traffic Transport Assessment Guidelines a sub-threshold TTA may be sought in line with the criteria contained in Table 2.3.

The TTA should also address the urban design impacts of public and private transport proposals and also address the delivery and monitoring regimes for any options. If the proposed development is subject to an Environmental Impact Assessment (EIA), the transport assessment should form part of the EIA Report.

Assessing Particular Types of Development

This Section, updates where required, the criteria for assessing planning applications for different types of retail development as set out in the previous Retail Strategy.

Convenience Food Shopping

New convenience retail development should be located in accordance with the sequential test. The Retail Planning Guidelines state that large convenience goods stores should be located in city or town centres or in district centres or on the edge of these centres and be of a size which accords with the general floorspace requirements set out in the development plan/retail strategy to support and add variety and vitality to existing shopping areas and also to facilitate access by public transport for shoppers.

However, the Retail Planning Guidelines acknowledge that in certain limited circumstances it may not be possible to bring forward suitable sites in or on the edge of a city or town centre because of the site requirements of large convenience goods stores, heritage constraints in historic towns, or because the road network does not have the capacity to accommodate additional traffic and service vehicles. In these cases, the sequential approach should be used to find the most preferable sites[52]. Notwithstanding this out of centre sites for this type of retail development require careful assessment in terms of their potential impact the Town Centre and nearby centres.

Accessibility is a key consideration for such developments and in keeping with sustainable development principles, proposals should be accessible by all modes of transport including pedestrians and public transport. Given the nature of convenience shopping, where customers generally carry out large weekly shopping, it is, however, important that an adequate level of car parking is provided.

In line with the retail caps set out in the Retail Planning Guidelines, a convenience retail floorspace cap of 3,000 sq.m net applies in County Carlow. This cap applies to both new retail stores and extensions to existing stores which will result in an aggregate increase in the net retail floorspace of the convenience element of such retail stores.

In mixed comparison/convenience retailing stores there is no cap on the amount of non-grocery or comparison space. Such proposals for large mixed convenience/comparison stores should clearly delineate the floorspace to be attributed to the convenience and comparison elements. A detailed assessment of the comparison element of such proposals should be undertaken including a full quantitative assessment of the potential impact of that element on existing comparison goods stores within the catchment area.

In areas planned for residential expansion, the development of a neighbourhood centre anchored by a convenience supermarket, with a floor area not exceeding 1,200 sq.m net, is prudent. Small scale convenience stores may also be appropriate in large industrial/employment zones where they anchor a neighbourhood centre serving the daily shopping needs of workers and employees.

District Centres/Shopping Centres

According to the Retail Planning Guidelines:

"*The role of a district centre is to provide a range of retail and non-retail service functions (e.g. banks, post office, local offices, restaurants, public houses, community and cultural facilities for the community at a level consistent with the function of that centre in the core strategy. They should not serve as a retail destination in their own right sufficient to adversely impact on the city/town centre to which they are subservient*[53]."

There are two designated District Centres in Carlow Town the Sleaty District Centre, Graiguecullen that is anchored by Dunnes Stores and the Sandhills District Centre at Hacketstown Road anchored by Supervalu. Given the requirement for compact growth in line with the NPF, and also the development potential of the Town Centre intervention areas identified in Project Carlow 2040: A Vision for Regeneration, this Retail Strategy is not making provision for any additional district scale retail centres in the County over the plan period.

The role and further growth of existing District Centres should be carefully managed to ensure that they retain their role as primarily destinations for the day to day shopping needs of a local catchment in line with their definition within the Retail Planning Guidelines. Such Centres must not be allowed evolve into a retail destination in their own right as this would impact the vitality and viability of the Town Centre.

Retail Warehouse Parks

In accordance with the provisions of 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.

In line with the guidance of the Retail Planning Guidelines and having regard to the existing retail warehouse provision, particularly in Carlow Town and Muine Bheag, there will be a presumption against further retail warehouse developments over the lifetime of this Strategy. The exception to this would be where new retail warehousing would have a demonstrable positive impact on the vitality and viability of the Town Centre due to its location within the Town Centre and/or adjacent to the core retail area. In such a situation the proposal will be assessed by the Planning Authority on its own merits in line with the provisions of the Retail Planning Guidelines.

There will also be a presumption against the development of bulky household floorspace in industrial/business parks. Applications for change of use of existing light industrial/business park units to retail warehouse use will be discouraged by the Council and such development directed to appropriate designated areas.

For clarity Carlow County Council will adhere to the provisions of the Retail Planning Guidelines and apply the following caps in relation to retail warehousing (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).

The range of goods sold from such retail warehouse units shall be restricted by planning condition to bulky goods as those defined within Annex 1 of the Retail Planning Guidelines. These include but are not limited to *inter alia* furniture and furnishings, household appliances, bulky pet products and tools and equipment for the house and garden.

While it is acknowledged that there are ancillary items associated with an otherwise bulky good offer, the Council will impose a cap of 20% of the total net retail floorspace of the relevant retail unit to such ancillary products in line with the Retail Planning Guidelines. Such space is to be clearly delineated on the planning application drawings to facilitate future monitoring and enforcement. Compliance that the goods being sold are consistent with the definition of non-portable bulky goods in order to promote and protect the vitality and viability of town centres will be closely monitored and enforcement action taken where retailing is non-compliant.

The use of long term vacant retail warehouse units, especially in areas where there is a mix of retail warehousing and warehousing, for e-commerce operations will be supported by the Council. Existing operators in the sector have already shown that both Muine Bheag and Tullow meet the locational and operational requirements of such facilities. Further developments which respond to this emerging trend in the retail sector will be supported by the Council where they do not impact the retail offer of a settlement or detract from its vitality and viability.

Outlet Centres

The Retail Planning Guidelines define outlet centres as "*groups of stores retailing end-of-season or discounted items at discounted prices and are typically located in out of centre locations*". The Guidelines state that the success of these centres depends on drawing customers and visitors from a wide catchment area, including tourists, and there may be implications for existing tourist centres and established town centres, even those some distance from the proposals.

Criteria for assessing such development should focus on whether it is located in a strategic location to capture expenditure from a very wide catchment area. It must also be demonstrated that the products sold will not be in competition with those currently on sale in typical town centre locations. The potential for such schemes to act as direct competition for town centres in the County Carlow area will need careful evaluation in each case.

Such development schemes should preferably be located within or immediately adjacent to the town centre in order to allow for the delivery of commercial synergies with the urban area, 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.

Having regard to the scale of catchment and the proximity of the Kildare Tourist Outlet Village, it is not anticipated that there is a demand for such centres in Carlow over the lifetime of this Strategy.

Factory Shops

Factory shops, usually 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 in line with the Retail Planning Guidelines. The exception to this would be where such outlets are 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[54].

Local Shops and Petrol Filling Stations

Local shops play an important role in providing for the day-to-day shopping needs of residents and those passing by. Primarily convenience outlets, local shops are a readily accessible service for basic goods, often for the less mobile members of the community.

The development of such local shops should be encouraged in large residential areas around the principal towns in the County. Such developments should be designed to a high standard and be easily accessible to all members of society.

Local shops at petrol filling stations is an area that has experienced significant growth in recent years. However, such shops, if of a certain scale, can attract additional custom and potentially impact the Town Centre.

The Retail Planning Guidelines state that the size of retail units associated with petrol filling stations should not exceed 100 sq metres. Where permission is sought for a shop associated with a filling station with floorspace in excess of 100 sq. metres, the sequential approach to retail development shall apply.

Retailing in Small Towns, Villages and Local Centres

Small towns, villages and local centres in urban areas play an important role in the retail hierarchy of County Carlow, providing valuable day to day retail facilities and services to their communities.

Development in such villages and small towns should be focussed in the core village/town centre area and complement existing retail provision. Such development in urban areas should be located to ensure maximum accessibility for the local communities they serve, particularly by foot.

The key objective is to provide and retain a range of retail facilities and services to serve the day to day needs of the local centre/village/small town's catchment area. Such retail development should be at a scale that is appropriate to the role of the relevant town or village as defined in the County retail hierarchy.

Retailing in Rural Areas

Retailing in the rural areas of County Carlow area should be directed towards existing settlements, with development in the countryside 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 including:

- A retail unit which is ancillary to activities arising from farm diversification.
- A retail unit designed to serve a tourist or recreational facility, ancillary to the main use.
- A retail unit attached to a craft workshop.
- A small scale retail unit (not in excess of 100 sq. metres gross) designed to serve a dispersed rural community.

Such proposals will be assessed on a case by cases basis on their merits in accordance with the proper planning and sustainable development of the area.

Casual Trading

Casual trading, including farmers markets, can make a valuable contribution to the local economy and contribute 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 and consideration should be given to the quality of offer of such casual trading.


SHAWE
MENSWEAR
MAC
sherwoo
switched o
sherwoods digital
FREE
5 YEAR
FREE FAIRY
sherwoods

Monitoring

11

Monitoring

Introduction

The Retail Planning Guidelines advise planning authorities to regularly monitor trends in their areas, and update retail policies as required.

Recognising that retail is a dynamic and ever changing sector and that trends, information and influences change and evolve over time, the Council is committed to monitoring the contents of this Strategy to ensure that:

- There are clear indicators to be assessed in order to ensure that baseline information is kept up to date and ensure that the study remains relevant
- The mechanisms in place to monitor the progress of the Strategy are appropriate and fit for purposes
- The Council are in a position to intervene in a positive and timely manner to address changing circumstances, if required.

This exercise was undertaken as part of the previous Retail Strategy, with the purpose of this Section to review and update same where required.

Floorspace Study

A detailed floorspace study was undertaken as part of the previous Retail Strategy, including a record of all retail floorspace in the principle towns within the County. The floorspace study was categorised by location and classification i.e. convenience, comparison and bulky household floorspace. This information has been utilised as a base and updated for use in this Retail Strategy.

As non-essential retail was closed at the time of undertaking this Strategy it was not possible or viable to undertake site visits to retail premises. A desktop study of retail planning permissions granted since the 2014 analysis was undertaken along with a review of the Vision-Net Directory of all commercial limited companies in County Carlow and a review of the GeoDirectory. This established changes to the retail environment that were subject to planning consent as well as providing a list of retailers currently operating in County Carlow.

The Survey was updated to include not only any identified increases or changes to the retail provision but the type of retail business e.g. newsagent, clothing, bakery etc., the categorisation as to whether convenience, comparison or bulky goods in accordance with the guidance set out within the RPGs and the net retail floor area. The floorspace figures for other settlements within the County contained in the previous Retail Strategy were also updated utilising a similar approach.

The Covid-19 Pandemic has had a significant impact on the retail environment, with the full extent of the impacts of the intermittent closures of 'non-essential' retail unknown at present. Although based on the response of such retailers to the initial round of restrictions, the impact has been significant, especially for many multiple operators such as Oasis, Topshop and Debenhams all of which closed their bricks and mortar stores.

It is recommended that the floorspace survey is reviewed once Covid-19 restrictions are permanently lifted. An appropriate period following the lifting of restrictions should be allowed for in order to provide for the return of 'standard' shopping patterns. Such a review will be important in gaining an understanding of the actual impact the Covid-19 Pandemic on the retail environment and retail floorspace in Carlow.

Given that there is potential for significant change, particularly in relation to smaller, independent retail provision, due to the Covid-19 Pandemic, this floorspace survey will also act as a base from which floorspace figures should be updated on an annual basis. In this regard, the Council will continue to keep a record of all planning permissions relating to retail development, including those that relate to a change of use. A record of commencement notices should also be maintained in order to determine what permissions are being implemented. The floorspace

data is also recorded on the GeoDirectory in order to facilitate easy identification of relevant units. The base data obtained from the post Covid-19 survey should be updated noting any changes of use or any additional new retail floorspace.

It will also be important to monitor and record extant retail permissions and any applications for extension of duration of such permissions. If any of these permissions are implemented, these should also be recorded on the floorspace data base.

It is recommended that an interim comprehensive review of the baseline floorspace survey is undertaken. This would involve on site checking of all retail premises noted on the data base to determine whether there have been any changes of use/ closure etc. Not only is such an analysis important in maintaining a complete and up to date database of retail properties but it will also help determine the longer term impacts of Covid-19 and emerging retail trends on trading patterns and retail provision. For example it may indicate in response to the experiential retailing trend there has been a greater emergence of independents despite the challenges of the Pandemic. Such information can assist in analysing how a centre is performing over time in light of increasing competition, changes in planning policy, emergence of new retail formats and also can help identify any gaps in retail provision.

Vacancy Rates

The floorspace survey undertaken as part of the previous Retail Strategy also included an analysis of the rates of vacancy within Carlow Town, Tullow and Muine Bheag. Vacancies within the core retail areas were mapped and identified. As with the floorspace survey with restrictive measures on the opening of non-essential retail still in place it was not possible at the time of undertaking this Strategy to accurately determine the impacts the Covid-19 Pandemic may have had on the retail sector in Carlow in terms of vacancy.

Updating the vacancy figures contained in the floorspace survey will be an important part of the recommended post-Covid survey. In this regard based on the last reopening of 'non-essential' retailing and the success of the message to 'shop local' the actual increase in vacancy attributable to the Covid-19 Pandemic may not be as severe as initially anticipated. It is noted that Carlow County Council are to commission a 'Land Use Map for Carlow Town Centre and develop a business case for the redevelopment of vacant units in Carlow Town Centre' part of which will include a detailed assessment of current vacancy within the Town in layers relevant to floors. A wider survey that addresses the Level 2 Centres within the County should also be undertaken.

Once a new base is established it will be important to carry out an annual review of the extent of vacancy within the core retail areas to determine whether vacancy rates are decreasing or increasing and determine where issues of long term vacancies exist. Vacancy should be mapped within the core retail areas.

Household Survey

The undertaking of a new household survey was not considered appropriate in a temporarily restricted and altered retail environment as it would not provide an accurate representation of people's 'normal', shopping patterns. In order to account for changes since the previous Survey, its findings have been updated in line with the retail trends identified in Section 3.

While the shopping patterns relating to convenience retail, identified in the previous Survey, are expected to have remained largely unchanged due to its essential nature, the current Pandemic has resulted in a notable change to comparison shopping patterns, as highlighted in Section 8. The closure of 'non-essential' retail, has resulted in an increase in on-line shopping for such items. While it is unlikely that this will continue to the same degree, once restrictions are eased/lifted, the longer term impacts are currently unknown. In addition, the recently finalised BREXIT has also impacted the retail environment and on-line sales from the UK.

As the full extent of the impacts of the intermittent closures of 'non-essential' retail due to Covid-19 is unknown at present it is recommended that a new Household Survey is undertaken once Covid-19 restrictions are permanently lifted. An appropriate period following the lifting of restrictions should be allowed for in order to provide for the return

of 'standard' shopping patterns. A new Survey will be important to establish if the forced changes to people's shopping patterns due to Covid-19 continue and in order to gain an overall understanding of how Covid-19 has impacted how people shop.

Health Checks

The detailed Health Checks for Carlow Town, Tullow and Muine Bheag (Bagenalstown) undertaken as part of the previous Retail Strategy have been updated having regard to the Town and Village Health Checks undertaken in 2017 and the Town and Village Key Project Plans for Tullow and Muine Bheag (Bagenalstown) undertaken in 2018.

The key indicators utilised in the assessment include:

- Introduction
- Identification of Core Retail Area
- Accessibility
- Natural Environment and Built Heritage
- Actions
- Existing Retail Environment
- Vacancy
- Conclusion

Covid-19 restrictions in place at the time of undertaking this Strategy meant that 'non-essential retail' was closed which had a significant impact on the vitality of Town Centres. In addition, as discussed previously, the impact of such lockdowns on the retail environment and vacancy levels is a complete unknown at present, but has the potential to impact the vitality of Town Centres.

It is recommended that a new Health Check for the three main centres of Carlow Town, Tullow and Muine Bheag is undertaken once Covid-19 restrictions are permanently lifted and allowing for an appropriate period for the return of 'standard' shopping patterns.

Once a new base has been established the Health Checks should be reviewed every two years to determine whether there has been any material change in any of the above indicators. Such an analysis on this basis allows for a time series database to allow comparison of centres based on an established set of criteria over time.

Quantitative Assessment

The Quantitative Assessment has been prepared on the basis of current economic data and predicted changes in population and economic growth. With regard to the latter, the Covid-19 Pandemic has brought a new dynamic to the economy and presents many unknowns in terms of economic forecasts. Notwithstanding this, those made in the latter part of 2020 have largely been representative of the economic impacts experienced in early 2021.

Projections in this Strategy are based on the best available information and are made in accordance with best practice. However, it is acknowledged that the economic growth forecasts are being made in unprecedented times and that the retail sector is a dynamic one that is constantly evolving, with Covid-19 speeding up such evolution in certain areas e.g. internet shopping. Similarly population forecasts are subject to change.

Given that the true impact of Covid-19 and specifically the long term impact on the economy and the population will not be know for some time, it will be important to monitor how the Strategy is performing in terms of the delivery of future floorspace requirements and also whether the underlying base line assumptions are following trend. In this context it is recommended that the following factors are monitored on an annual basis:

Population Growth

The population projections are based on the rates provided in the 'Implementation Roadmap for the National Planning Framework' and are in accordance with the Council's Core Strategy. It is recommended that population projections are reviewed regularly to ensure that the targets set out are being achieved.

Any future revisions to population targets issued by the Department, specifically on foot of the Covid-19 Pandemic, should be incorporated into this Strategy.

Expenditure Growth

This Strategy utilises expenditure per person in determining future floorspace requirements. It is recommended that the Annual Services Enquiry (published every two years) and the Retail Sales Index is reviewed to ensure that expenditure levels follow those set out.

Internet Sales

The undertaking of a new household survey, was not considered appropriate in a temporarily restricted and altered retail environment as responses would not be an accurate representation of normal shopping patterns. Instead the 2015 Survey results were reviewed, as a more accurate reflection of shopping patterns, and the identified retail and economic trends applied to these figures to update them. This innovative approach provides for an update of the Survey findings in line with the trends and changes that we know have, and are, occurring in the retail sector since 2015 while ensuring that the overall findings are not skewed by the current temporary retail market conditions on foot of the Covid-19 Pandemic.

A key finding from this exercise was the scale of the estimated growth in internet sales. While the growth in internet sales was already a well established retail trend, the Covid-19 Pandemic and specifically the closure of 'non-essential' retail has led to a significant increase in internet sales. The nature of the lockdowns and the public health advice has, however, meant that this increase was experienced in both comparison and convenience retail sales.

While internet sales are likely to continue to be a popular form of retailing as technologies improve and retailers embrace and promote this retail format and new trends emerge in the area, Covid-19 has shown that bricks and mortar retailing and the retail experience remain at the heart of shopping patterns in Ireland.

In this regard, it is recommended that expenditure data is regularly reviewed and adjusted over the life time of this Strategy to account for any notable changes documented by the CSO or other verifiable sources in terms of internet sales expenditure and that the implications for retail floorspace requirements are monitored. It is also recognised that the link between internet retailing and retailers floorspace requirements is changing as 'Online Stores Need Offline Spaces' and this emerging trend and its impact on the retail profile of Carlow also needs to be monitored.

Appendix

A

Core Retail Areas and Opportunity Sites

Introduction

Core Retail Areas

This Section reviews the Core Retail Areas identified in the previous Retail Strategy and refines these based on the guidance of the Retail Planning Guidelines. In this regard the Guidelines state that:

"The footprint of retail uses is very helpful in identifying the core retail areas of a city or town, the primary and secondary shopping streets, and useful in distinguishing between city/town centre and edge-of-centre[55]."

The Core Retail Areas for the key centres of Carlow Town, Tullow and Muine Bheag have thus been reviewed in the context of where the focus of existing retail uses/floorspace is in each settlement.

The revised boundaries thus represent the core area within these Towns where retail is focused on the ground. In this regard some minor revisions to the boundaries contained in the previous Retail Strategy have been made where lands did not have a concentration of retail uses and/or did not form a coherent or legible part of the clearly identifiable retail core. In this context, lands that are more appropriately considered as opportunity sites, have been excluded from the Core Retail Areas but have been identified under the opportunity sites for the key settlements where appropriate.

Opportunity Sites

Opportunities for additional retail or other complementary uses both within and immediately adjacent to the identified Core Retail Areas are identified. In relation to such Opportunity Sites the Retail Planning Guidelines state:

"Planning authorities should therefore, be proactive in identifying opportunity sites, of different sizes and in the different locations of the core retail area, and providing the necessary linkages between the different types of retail areas of a city/town. It is important that these linkages are safe, pleasant, and attractive, particularly for the pedestrian and cyclist[56]".

Some of the sites identified remain unchanged from the previous Retail Strategy, other sites are a new addition, while some have been removed. The removal of sites was undertaken where development has occurred/been permitted, due to the distance from the retail core or where the development of the site was considered to be more appropriately addressed under a different plan/strategy e.g. in the case of Carlow Town and Project Carlow 2040: A Vision for Regeneration.

The aim to protect and promote the vitality and viability of the Town Centre, and specifically the retail core, was the guiding principle in identifying the Opportunity Sites. In line with the provisions of the Retail Planning Guidelines the size of these sites differs with some being substantial while other represent important linkage opportunities. Given that Carlow Town, Tullow and Muine Bheag already have a good convenience retail offer, accommodating most of the multiples, the opportunity for Town Centre sites in these settlements will lie not just with the provision of additional retail but with the delivery of a range of complementary uses that achieve multifunctional places.

The identified Opportunity Sites will thus be important in positioning the key centres to take advantage of the emerging community orientated shopping trend discussed in Section 3 of this Strategy. In addition in Tullow and Muine Bheag the potential development of such sites as locations for niche retailing could also promote and facilitate experiential retailing.

It should be noted that the Opportunity Sites, as shown on the following maps, provide a general location only. At this strategic level it would not be appropriate to provide exact site boundaries as flexibility will be required to allow for *inter alia* site ownership, site assembly and rights of way.

A 'Dashboard' is provided for each Opportunity Site for ease of reference, highlighting the key features of the site under the following headings:

- Location
- Existing Land Use
- Land Use Zoning
- Accessibility
- Relevant Extant/Live Planning Applications
- Items Of Note

Carlow Town

The definition and reinforcing of the role and function of the Core Retail Area of Carlow Town Centre is of critical importance. This role and function while primarily focused on retail provision must also now consider complementary uses in the context of delivering multi-functional places that respond to the emerging trends around community oriented and experiential retailing.

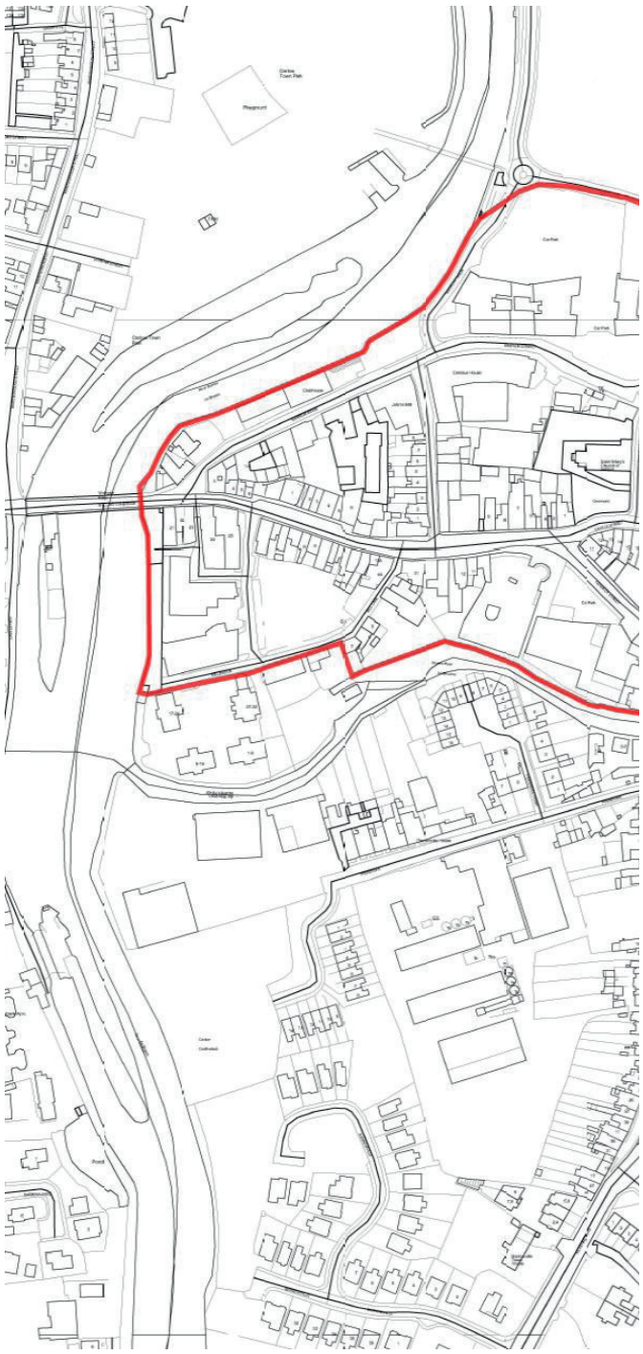
Tullow Street and Dublin Street formed the original street grid of Carlow and their intersection represented the very core of the traditional Town Centre. However, in recent years this dynamic has changed and the retail core is now centred on Tullow Street, Dublin Street, Potato Market and the future Barrack Street link. Outside of this traditional core, the Core Retail Area also reflects the expansion of retail to the south east in the form of the established Fairgreen and Carlow Shopping Centres.

Key considerations with regard to the Core Retail Area of Carlow Town Centre are as follows:

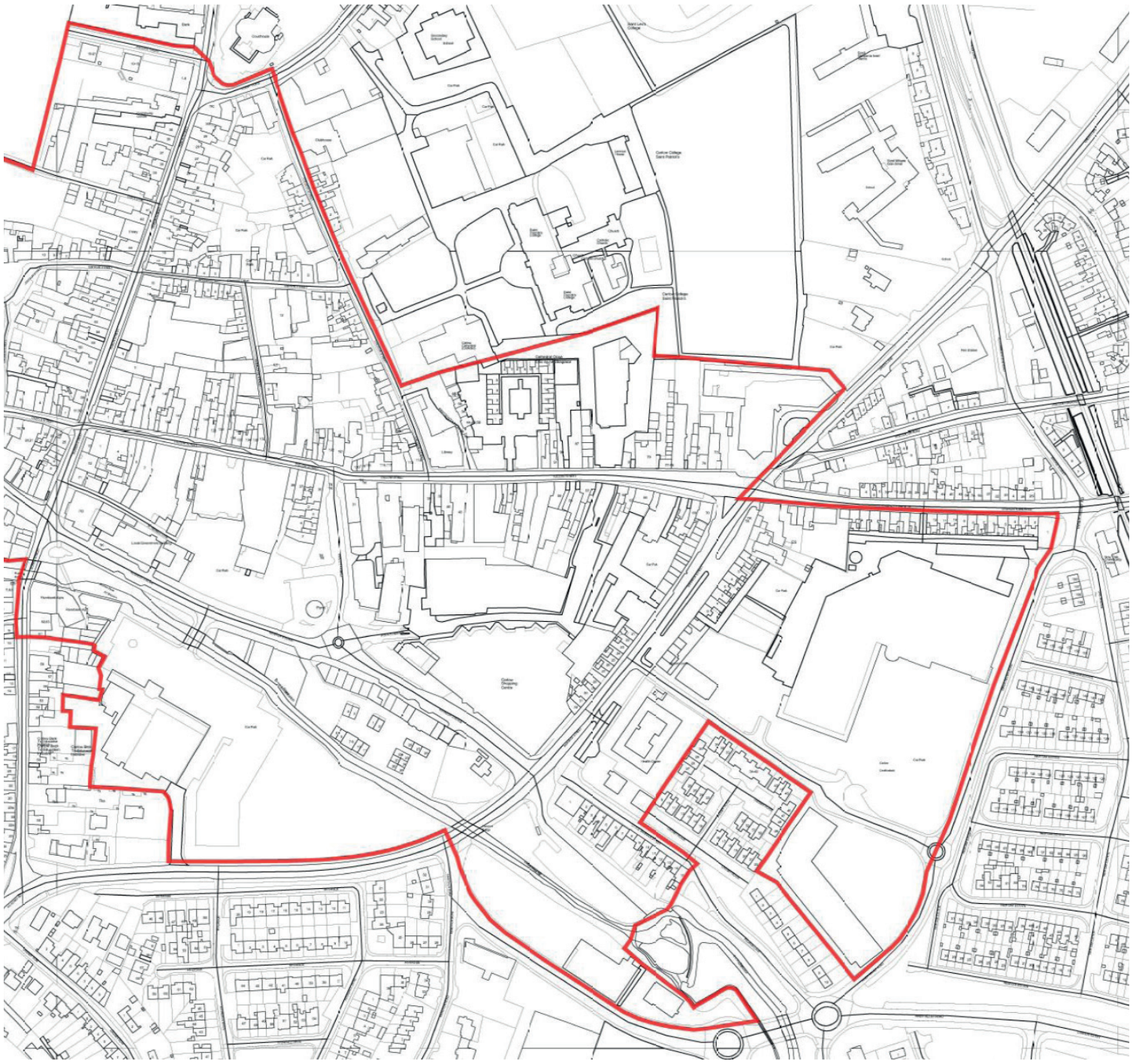
- There is a need to enhance the retail role and function of the streets in the traditional core.
- Consideration must be given to emerging retail trends and how the Core Retail Area of Carlow Town can be positioned to not just respond to but benefit from these.
- The need for increased permeability between the traditional retail core and the newer south eastern town centre expansion area.

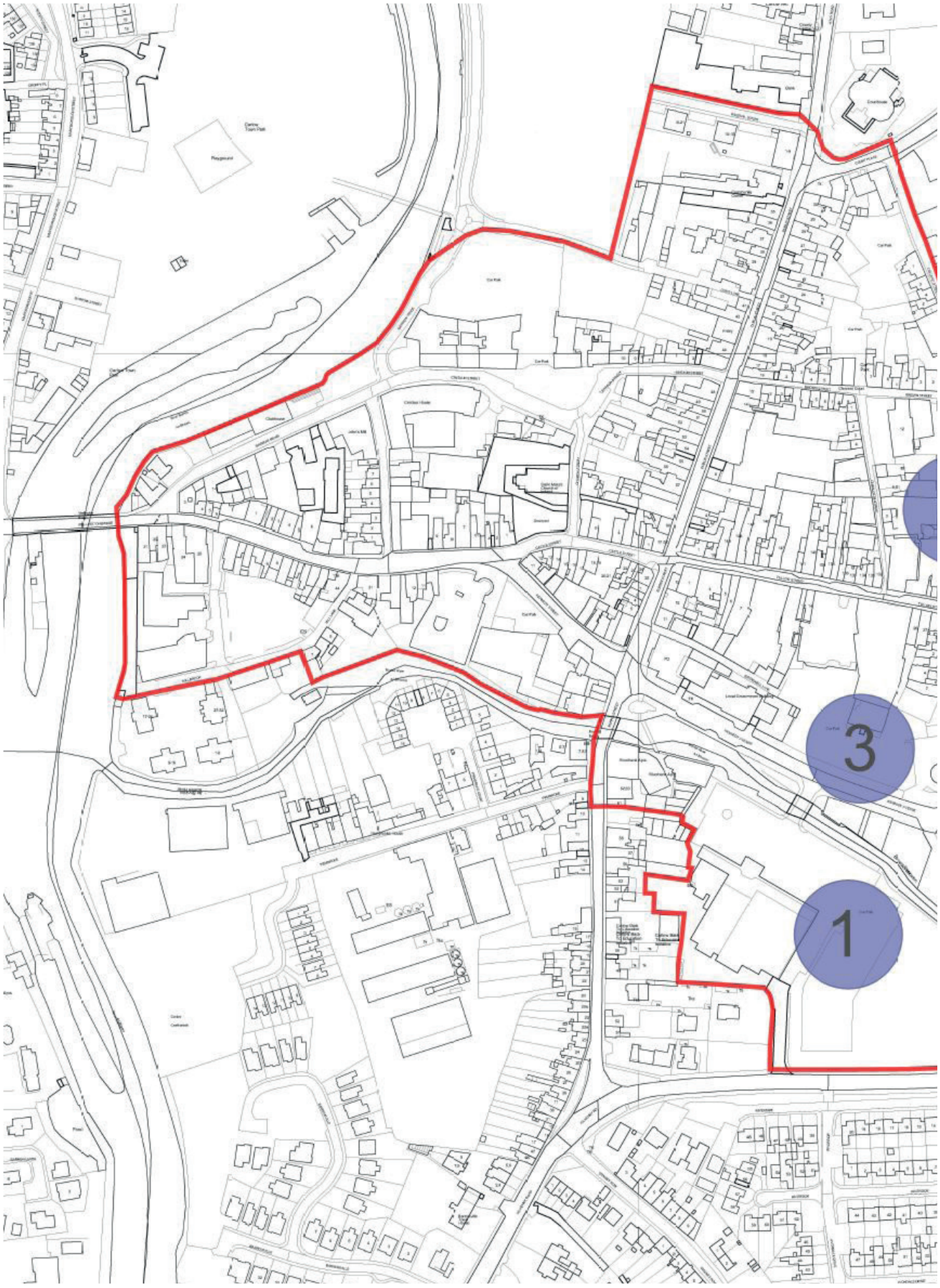
Map CT2 provides the general location of the Opportunity Sites within Carlow Town, with each site addressed in turn. The Opportunity Sites are identified as appropriate locations to accommodate future retail and/or mixed use development within and adjacent to the Core Retail Area.

The redevelopment of these sites not only provides the opportunity to consolidate and strengthen the Core Retail Area and wider Town Centre but for enhanced permeability and public realm improvements.

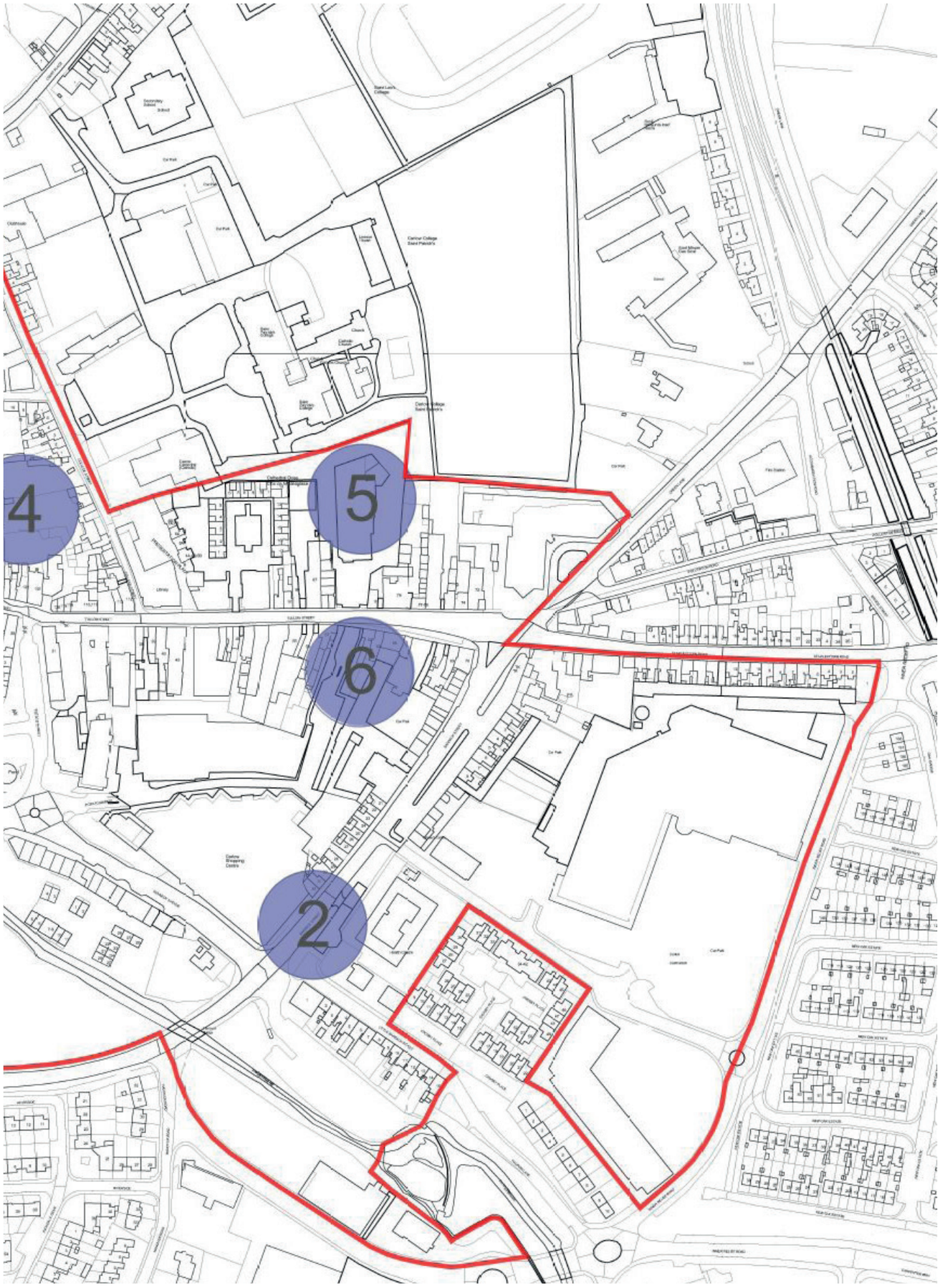


Map CT1: Carlow Town Core Retail Area





Map CT2: Carlow Town Opportunity Sites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Opportunity Site 1- Penney's Site & Hanover Shopping Centre, Kennedy Avenue

Core Retail Area

Vacant - Retail

Town Centre

Good accessibility - both vehicular and pedestrian

Reg. Ref. 10/6308, Board Ref. 236653, Reg. Ref. 16/136 and Reg. Ref. 19/478, Board Reg. 307766

River Burrin forms the northern site boundary

Opportunity Site 1 is located to the south of Carlow Town Centre off Kennedy Avenue, within the Core Retail Area. The site is triangular in shape and adjoined by Kennedy Avenue to the north and the main Kilkenny Road to the south. The site is bound to the north by the River Burrin, a tributary of the River Barrow, which separates it from Kennedy Avenue. To the east is Hanover Park, a triangular public park flanked by the Kilkenny Road along one boundary and the Burrin River to the north.

The western boundary of the site is currently occupied by the large scale, former Penney's retail unit and associated surface car park area, accommodating approximately 270 no. cars. The site also includes the Hanover Shopping Centre which is to the west of the site and comprises a parade of vacant retail units.

There are two existing main vehicular accesses to the site one from the Kilkenny Road and the other from Kennedy Avenue across a bridge over the River Burrin. Hanover Park is accessible from Penny's car park and from a pedestrian entrance along the Kilkenny Road, at the south eastern extremity.

The site is zoned 'Town Centre' under the Joint Spatial Plan for the Carlow Graiguecullen Urban Area 2012-2018 (extended to November 2022). The Plan also recognises that site as an Opportunity Site for the Town.

The site benefits from a number of relevant planning permission as follows:

- Under Reg. Ref 10/6308, Board Ref. 236653 planning permission was granted for development comprising the following - *"The demolition of the existing Penney's Store (ca 4,000 sq.m) and Hanover Shopping Centre (770 sq.m) and adjoining buildings. It is proposed to construct a retail development with a gross floor area of 26,071 sq.m comprising of 36 units of 13,492 sq.m (net) comparison shopping and 580 sq.m (net) convenience shopping, 975 sq.m cafe and food court, an occasional farmers market, 927 sq.m of Class 3 Offices, 30 residential units comprising a mixture of two and three bedroom apartments and two bedroom duplex units. The proposal also includes ancillary mall, signage, circulation, service, plant areas and public/private open space. The proposal is a two, three, five and seven storey structure over a 640 sq.m single level underground car park".* This permission has been extended until November 2021 under Reg. Ref. 16/136.
- Under Reg. Ref. 19/478, Board Ref. 307766 planning permission was sought for *"the refurbishment of the existing store (3892sqm) including retail, staff area, stock room, external envelope, new plant buildings (29.16sqm) and replacement roof to the retail store. The works will also include new signage, new canopy to loading bay, convert partial convenience retail to comparison retail, allocation of 47 No. carparking spaces including 3 No. disabled parking spaces, 15 No. bicycle stands, upgrade of existing carparking surface, landscaping and entrance to store, temporary hoarding to adjacent properties and associated works."* The application was granted by Carlow County Council and subsequently by the Board following appeal (Board Ref. 307766).

Given that the permission for the large scale redevelopment of the site will expire in November 2021 and having regard to the recent permission to refurbish the existing store on site, it is highly unlikely that the redevelopment of this important Town Centre site will be delivered.

While the return of Penney's and an active retail use to the site is welcomed, there is significant scope to develop this low density, older format retail facility for a mix of uses, such as those previously permitted under Reg. Ref. 10/6308, Board Ref. 236653. Such a redevelopment would present a significant opportunity to improve the multi-functionality of the Retail Core. In addition, given its central location, the redevelopment of the site would also deliver significant benefits to the vitality and viability of the core retail area of Carlow.

It would also offer potential placemaking benefits in combination with the pedestrianisation and public realm upgrades that form part of the Potato Market Intervention Area outlined in Project Carlow 2040; A Vision for Regeneration.

The redevelopment of the site also offers opportunities to provide an appropriate frontage to Kennedy Avenue that would integrate with the Barrack Street Intervention outlined in Project Carlow 2040; A Vision for Regeneration, as well as for enhancements to the public realm and setting of the River Burrin.

Figure CT1: Penney's Site & Hanover Shopping Centre

Opportunity Site 2 - Barrack Street

	Core Retail Area
	Traditional Core Retail Area
	Area is zoned Town Centre
	A key Town Centre Street
	N/A
	River Burrin forms the northern site boundary

Opportunity Site 2 is Barrack Street, part of the traditional Core Retail Area of Carlow Town Centre. Barrack Street presents a number of opportunities for redevelopment of existing sites, improvement to the public realm and enhanced linkages within the Town Centre. Barrack Street is central to increasing pedestrian mobility and the delivery of better management of cars and pedestrians to improve the overall quality of the space and serve to reinstate the area as the 'Heart of the Town'.

Project Carlow 2040: A Vision for Regeneration includes Barrack Street in the Town Centre Intervention Area about which it states:

"The purpose of this Intervention is to improve Town Centre linkages and increase pedestrian mobility from Potato Market through to Barrack Street with wider connectivity to Carlow College and the Railway Station."

Project Carlow 2040: A Vision for Regeneration states that the improved connections between Potato Market and Barrack Street would provide additional routes around the Town Centre and enhanced overall circulation leading to a better experience of the area. The integration of link streets such as Tullow Street, Dublin Street and Shamrock Square are important facets of this intervention and they serve to enhance the vibrancy and viability of this space. The Proposal seeks to achieve a balance in this area of transition to the Town Centre, which will support the vitality of the retail/commercial businesses while bringing the visual uplift that will unify with the Barrack Street Link to Potato Market and Tullow Street in particular.

In addition, the Joint Spatial Plan for the Greater Carlow Graiguecullen Urban Area identifies Barrack Street as Opportunity Site 8. The Plan identifies a number of opportunity sites within the Barrack Street Area which would benefit from redevelopment to a maximum height of four storeys including:

- Site at Intersection of Kilkenny Road and Little Barrack Street
- Corner of Kennedy Avenue and Kilkenny Road (Walshe's)
- East Side of Barrack Street
- West Side of Barrack Street
- Ulster Bank, Potato Market and Kennedy Avenue

The upgrading of Barrack Street and its public realm has already secured funding of c. €1.2 million from Rebuilding Ireland for the refurbishment of properties. The implementation of the Project Carlow Intervention will ensure the most efficient use of public funds from different sources which together will achieve a greater return on investment

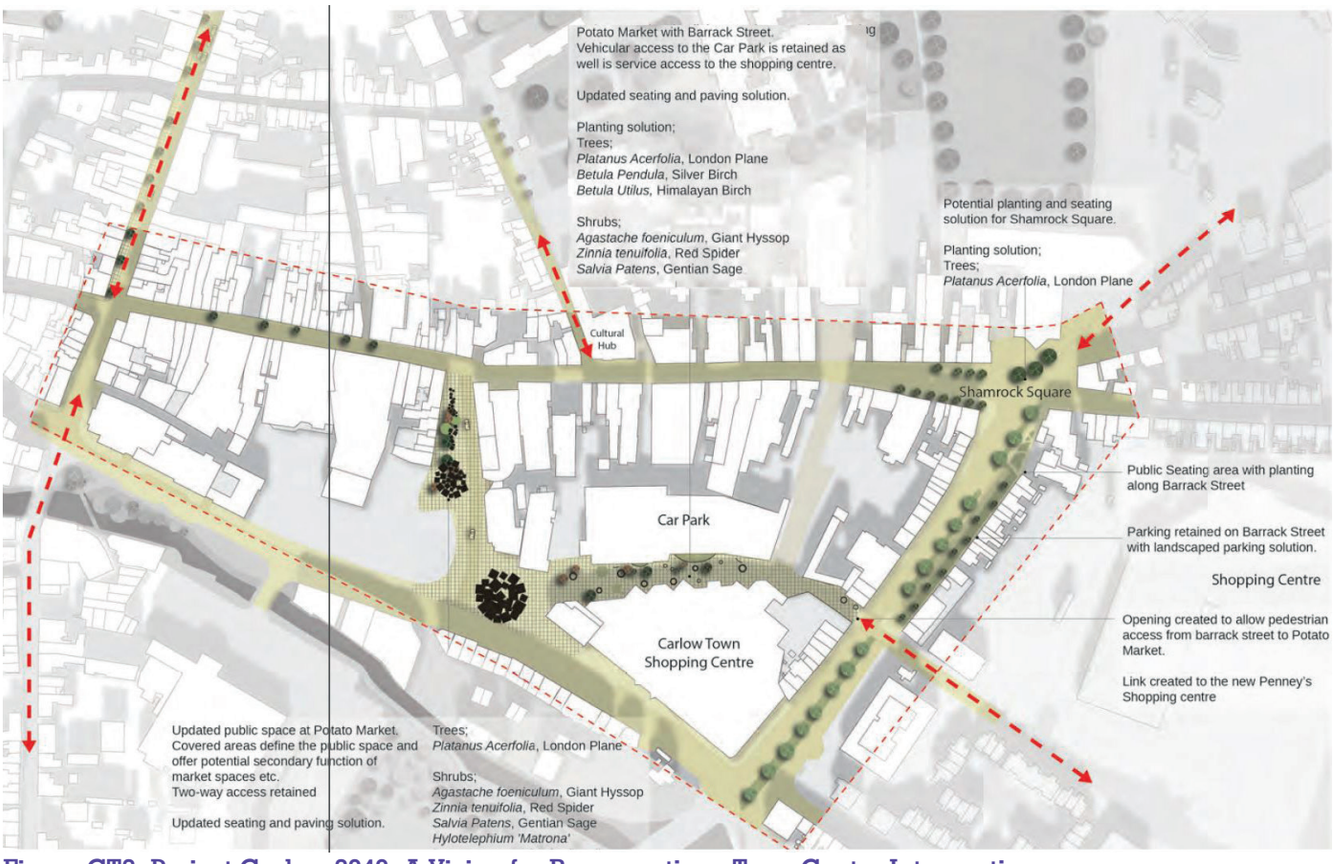


Figure CT2: Project Carlow 2040: A Vision for Regeneration - Town Centre Intervention

Opportunity Site 3- Plas na Saoirse, Kennedy Avenue

Core Retail Area

Car Parking

Town Centre

Good accessibility - both vehicular and pedestrian

N/A

The adjacent Potato Market is an Intervention Area under Project Carlow 2040: A Vision for Regeneration

Opportunity Site 3 is located on the northern side of Kennedy Avenue, opposite Opportunity Site 1, within the Core Retail Area. The site is located to the rear of commercial units that front Tullow Street, is immediately west of Potato Market and currently accommodates a surface level car park.

There are two existing main vehicular accesses to the site one from Kennedy Avenue and one from Potato Market. There is also a dedicated pedestrian crossing on Kennedy Avenue.

The Joint Spatial Plan for the Carlow Graiguecullen Urban Area, 2012-2018 identifies that the existing surface car park at Plas na Saoirse fragments the Town Centre presenting a large expanse of open space along Kennedy Avenue. The Plan also notes that this area is a gateway to the Town Centre and is currently uninviting.

The redevelopment of the site provides a key opportunity within Carlow to integrate the traditional Town Centre focused on Dublin Street, Tullow Street, Barrack Street and Potato Market with the newer shopping areas at Fairgreen and Carlow Shopping Centres through the enhancement of pedestrian linkages across Kennedy Avenue.

There are opportunities for pedestrianisation and for public realm upgrades that would integrate with the proposed Potato Market Intervention Area as outlined in Project Carlow 2040; A Vision for Regeneration. The redevelopment also offers opportunities to provide an appropriate frontage to Kennedy Avenue.

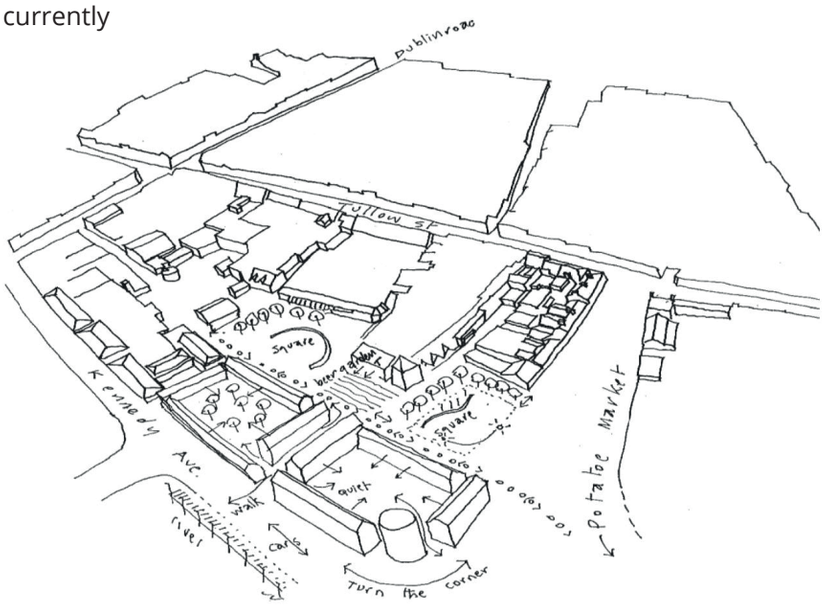


Figure CT3: Isometric Illustration of Block Pattern, Landscaping and Movement - Joint Spatial Plan for the Carlow Graiguecullen Urban Area, 2012-2018

Opportunity Site 4 - Stonemason's / Crotty's Site

Core Retail Area

Backland Site

Town Centre

Restricted Access

N/A

Will require site assembly

Opportunity Site 4 is a backland area zoned Town Centre and located to the rear of Tullow Street, Charlotte Street and College Street.

Access to the site is currently restricted and the site comprises vacant 2 storey properties which front onto Charlotte Street and Tullow Street and a gated entrance from College Street.

The Joint Spatial Plan for the Carlow Graiguecullen Urban Area, 2012-2018 identifies the site as a suitable location for infill development to consolidate the existing built form of the Town. The redevelopment of the site also provides opportunities for the creation of new linkages between College Street and Charlotte Street.

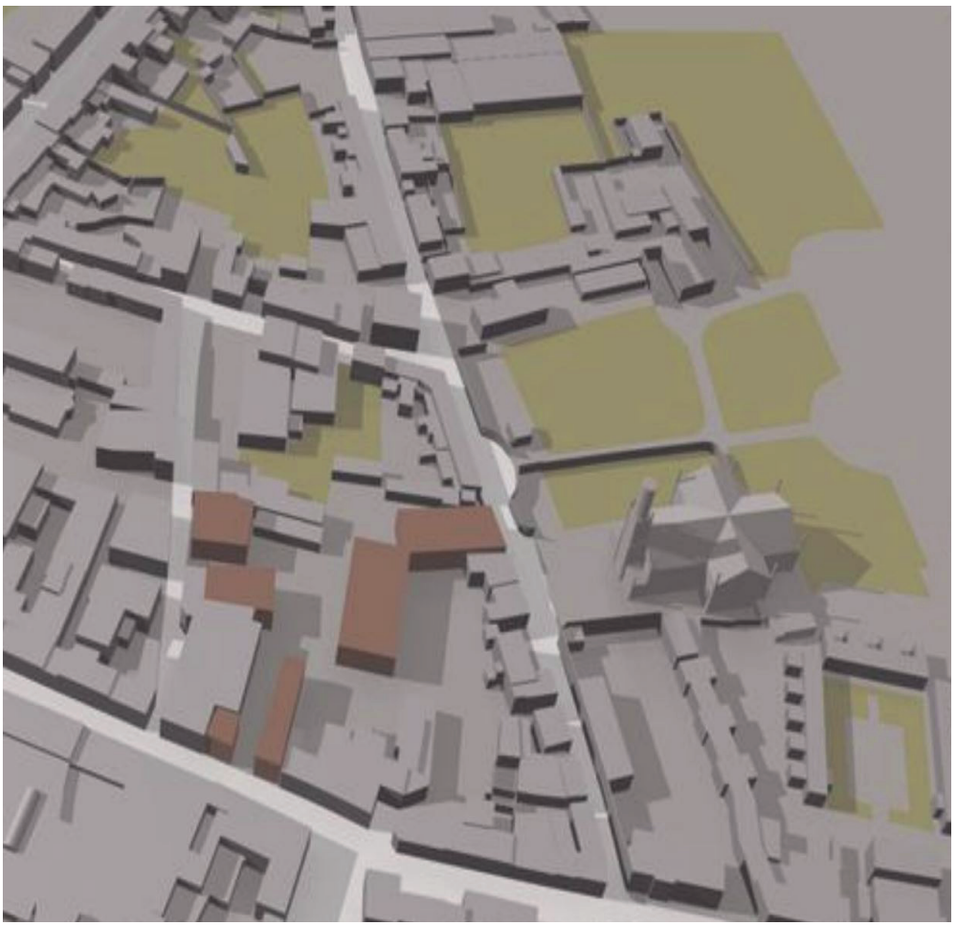


Figure CT4: Proposed Block Pattern within Stonemasons' Site - Joint Spatial Plan for the Carlow Graiguecullen Urban Area, 2012-2018

Opportunity Site 5 - Penny Lane Building, Tullow Street

Core Retail Area

Retail

Town Centre

Good accessibility directly from Tullow Street

Reg. Ref. 17/61

Although in active use the site has redevelopment potential

Opportunity Site 5 is located on the northern side of Tullow Street, directly opposite the entrance to the Carlow Shopping Centre multi-storey car park. There is an existing two storey building on site surrounded by surface car parking. The site is zoned Town Centre and currently accommodate a Home Savers retail unit. There is also a parade of small retail units along the western boundary of the site.

The site, which was vacant at the time of the previous Retail Strategy, is now in active use as a retail unit. Reg. Ref. 17/61 permitted the replacement of the shopfront and provision of new signage for the current operators, Home Savers.

The previous Retail Strategy noted that planning permission had in the past been permitted for the development of a 4 storey mixed-use development on the site to include an 88 bedroom hotel with associated multi-storey car park and retail and cafe uses at ground floor level (Reg. Ref. 07 /59997 & 09/6207).

These permissions demonstrate the redevelopment potential of the site, which is currently underutilised given its Town Centre location and position on a main shopping street. The redevelopment of the site has the potential to provide a range of uses, would bring increased footfall and much needed investment to the eastern end of Tullow Street.

Figure CT5: Image taken from Google Streetview

Opportunity Site 6 - Tullow Street

Core Retail Area

Traditional Core Retail Area

Area is Zoned Town Centre

A Key Town Centre Street

N/A

An enhanced public realm will encourage the re-use of vacant properties

Opportunity Site 6 is Tullow Street, a traditional shopping street within the Town Centre. The Street is a primary retail street with independent shops, restaurants, cafés and pubs, all of which are all zoned Town Centre under the The Joint Spatial Plan for the Carlow Graiguecullen Urban Area, 2012-2018.

In addition the Street also contains a number of vacant units, with the group of buildings adjoining the entrance to the Carlow Shopping Centre mutli-storey car park of particular note. These vacant units presently detract from the overall amenity of the Street and give an impression of dereliction to the eastern end of the Street.

Project Carlow 2040: A Vision for Regeneration includes Tullow Street along with Dublin Street as the Link Street Intervention stating that:

"This Intervention seeks to support the vitality of the Town Centre as the retail/ commercial core while delivering the visual uplift that will unify the overall Town Centre... The upgrading of the urban environment and public realm along these streets also provides the opportunity to address existing traffic and pedestrian safety issues."

Project Carlow 2040: A Vision for Regeneration states that Intervention would deliver an improved Town Centre experience, enhanced connections between key Town Centre areas and increased vitality and vibrancy.

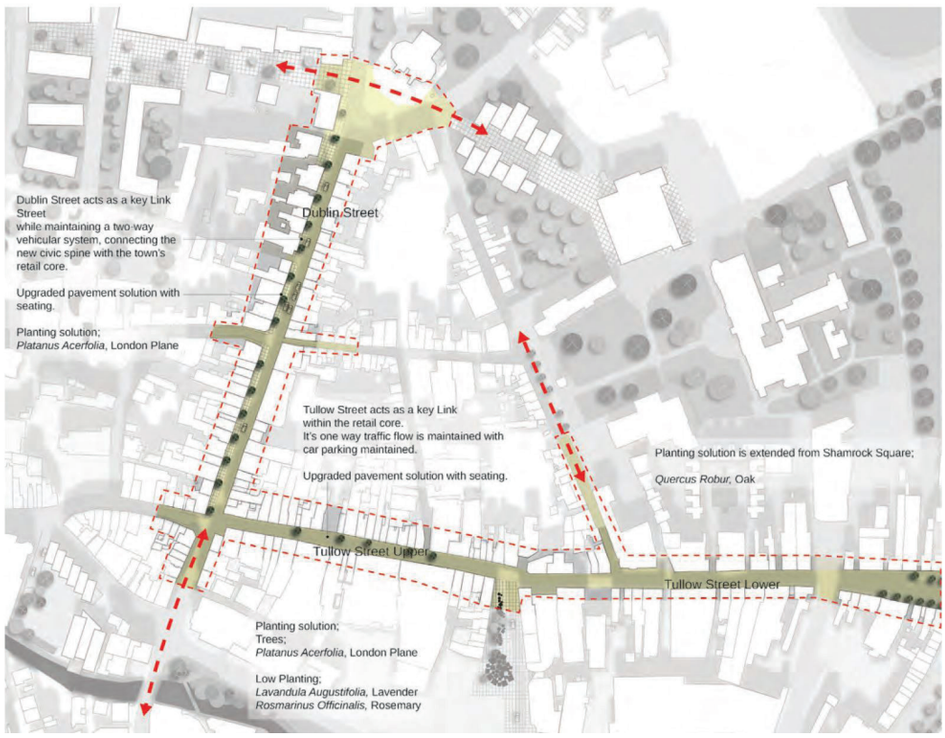


Figure CT6: Project Carlow 2040: A Vision for Regeneration - Link Streets Intervention

Tullow

The Core Retail Area of Tullow is largely defined by the linear nature of the Main Street as well as the River Slaney to the west. The Town has a traditional layout, with Market Square the primary retail area.

While there are limited opportunity sites for large scale retail development in the Town Centre, a number of opportunity sites of varying sizes have been identified in line with the provisions of the Retail Planing Guidelines. These opportunity sites are primarily located in the backland areas to the north and south of the Main Street.

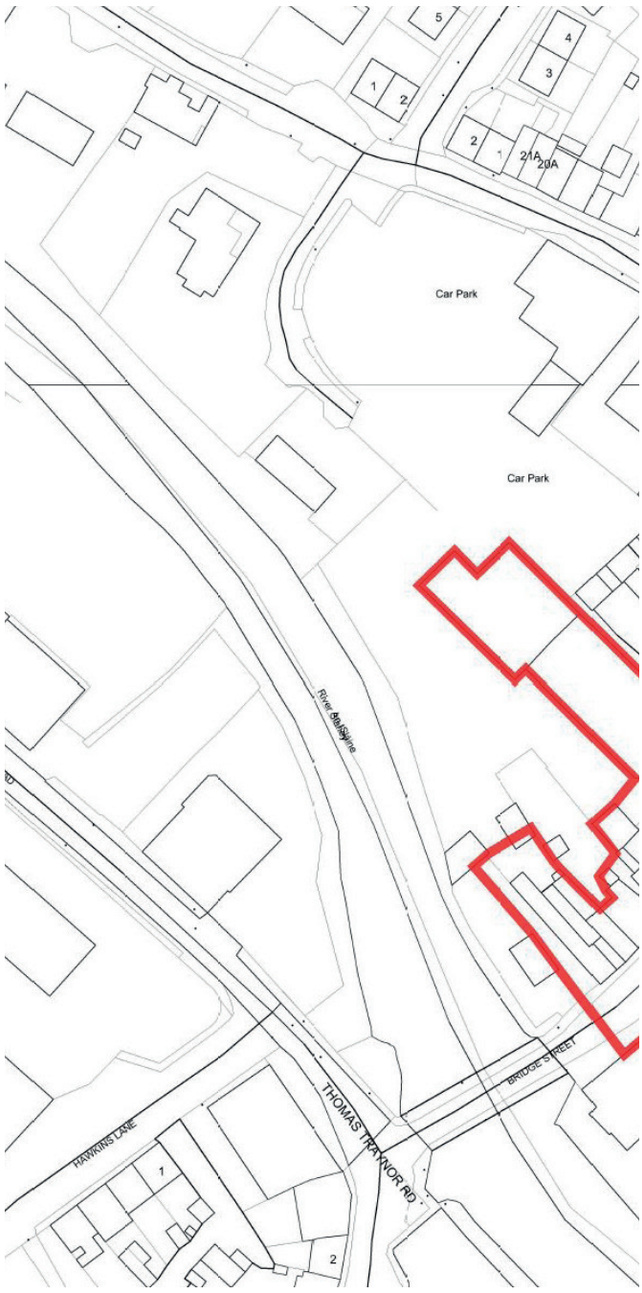
Tullow already has a good convenience retail offer, accommodating most of the multiples, primarily at edge of centre locations. While the Town would benefit from an improved comparison retail offer, this would be of a scale in keeping with the Town's function in the retail hierarchy. There is thus unlikely to be a requirement for large scale retail development in the short to medium term.

There are sufficient opportunities in terms of the utilisation of vacant Town Centre units and the identified Opportunity Sites to accommodate not just additional comparison retail development in the Town Centre but also complementary uses. The delivering of multi-functional places that respond to the emerging trends around community oriented and experiential retailing will be key to the future attraction and vitality of the Town and supports the delivery of a niche retail/tourist offer for Tullow.

Map T2 provides the general location of the Opportunity Sites within Tullow, with each site addressed in turn. The Opportunity Sites are identified as appropriate locations to accommodate future retail and/or mixed use development within and adjacent to the Core Retail Area.

The redevelopment of these sites not only provides the opportunity to consolidate and strengthen the Core Retail Area and wider Town Centre but for enhanced permeability and public realm improvements and to open up the backlands.

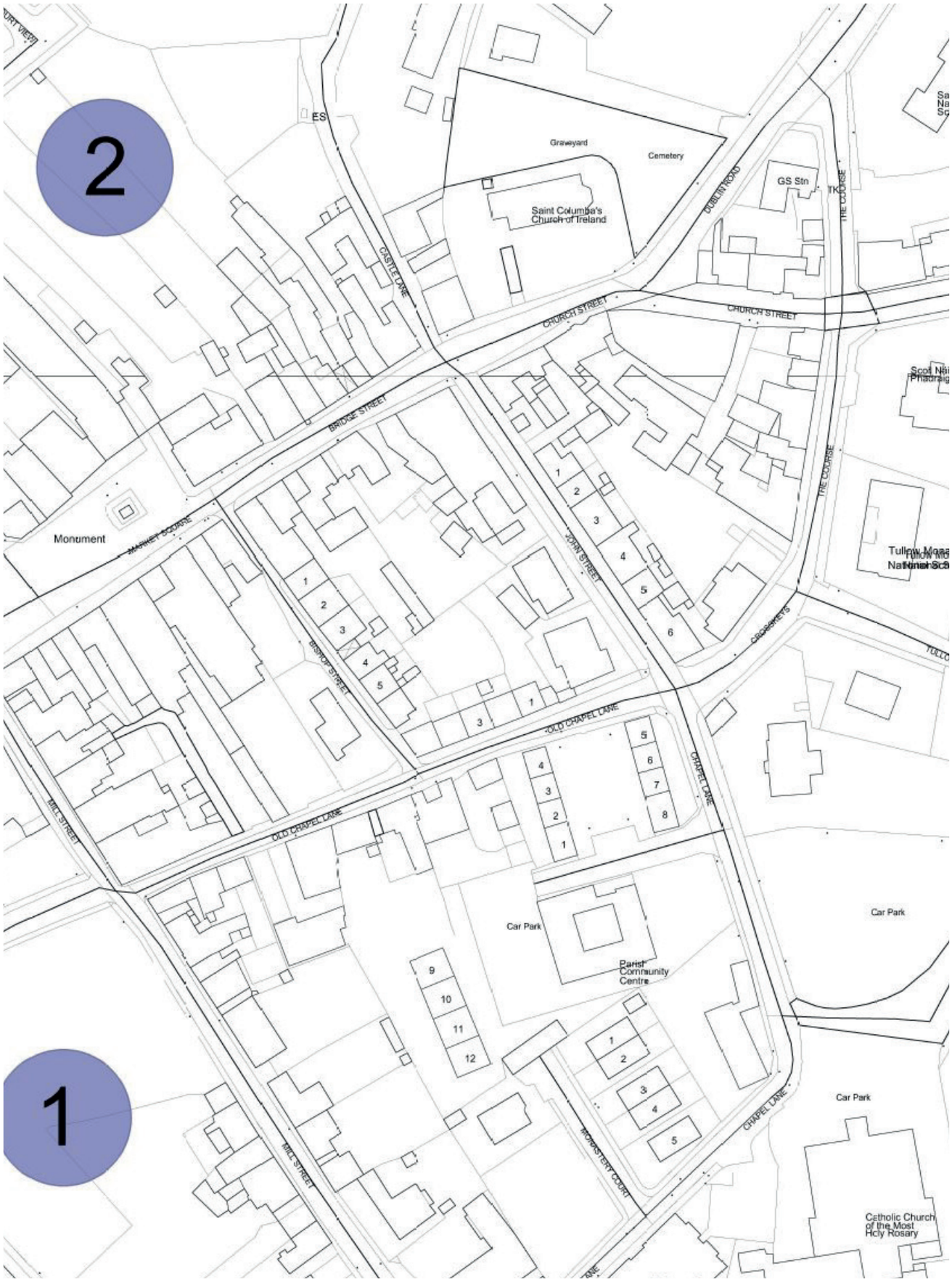
The opportunity site at Thomas Traynor Road, identified in the previous Retail Strategy, has been omitted as it is removed from the Core Retail Area and Town Centre. Its development as an opportunity site is addressed in the Tullow Local Area Plan, 2017-2023.



Map T1: Tullow Core Retail Area


Car Park
26
ES
Graveyard
Cemetery
GS Stn
TK
Saint Columba's
Church of Ireland
DUBLIN ROAD
THE COURSE
CASTLE LANE
CHURCH STREET
CHURCH STREET
BARRACK STREET
BRIDGE STREET
BARRACK STREET
Monument
MARKET SQUARE
JOHN STREET
CROSSKEYS
BISHOP STREET
OLD CHAPEL LANE
CHAPEL LANE
BRIDGE STREET
MILL STREET
OLD CHAPEL LANE
Car Park
Car
Park
Parish
Community
Centre
Library
Car Park

Map T2: Tullow Opportunity Sites


2
1
Graveyard
Cemetery
Saint Columba's Church of Ireland
GS Stn
DUBLIN ROAD
THE COURSE
CASTLE LANE
CHURCH STREET
BRIDGE STREET
MARKET SQUARE
Monument
JOHN STREET
BISHOP STREET
CROSSKEYS
OLD CHAPEL LANE
CHAPEL LANE
MILL STREET
Car Park
Parish Community Centre
MONASTERY COURT
Catholic Church of the Most Holy Rosary

Opportunity Site 1- Mill Street Car Park

Edge of Core Retail Area

Car Parking

Town Centre

Good Accessibility

N/A

Opportunity Site in the Tullow LAP, 2017 -2023

Opportunity Site 1 comprises an existing surface car park located to the east of Bridge Street and to the south of Mill Street. There is a set fee to use the car park while the surrounding streets provide free on-street parking resulting in the car park being underutilised.

The site is zoned Town Centre and rises in level from west to east. It has frontage onto Mill Street and the Inner Relief Road and is directly opposite the library and Civic Offices.

The Tullow Local Area Plan, 2017-2023, recognises the site as an opportunity site for the Town stating that:

"It is strategically located to form an extension to the town centre core and has the potential to deliver additional retail development that would complement and improve existing services in the town…to directly link with the town centre core at Mill Street, leading to Market Square and Bridge Street and its redevelopment may act as a catalyst for additional development and the attraction of additional uses at these locations."

It is strategically located to form an extension to the Town Centre core and has the potential to deliver additional retail development and other complementary uses that would enhance the service profile of Tullow. A mixed-use development would also present the opportunity to bring people back living in the Town, which would have notable positive impacts on vitality and viability.

In line with the Tullow LAP the site is considered to be a key Town Centre opportunity site and its development should be encouraged.

Figure T 1: Image taken from Google Streetview

Opportunity Site 2 - Northern Backlands

Adjoins the Core Retail Area

Backland Site

Town Centre

Restricted Access at Present

N/A

Will require site assembly

Opportunity Site 2 is a backland area zoned Town Centre and located to the north of the Main Street. The site comprises multiple parcels of land to the rear of properties fronting the Main Street which currently have a range of uses including car parking, a beer garden and open space.

Access to the lands is currently restricted with an access located to the rear of Bank of Ireland on Market Square and an access road located adjacent to Foran's Public House. The latter also provides vehicular access to other properties located on it but terminates as a road and becomes a pedestrian path at the north eastern extremity of the site.

The site is considered a suitable location for infill development and given its location would consolidate the Town Core, centred on Market Square. It has the potential to deliver additional retail development and other complementary uses that would make the Market Square area more multi-functional and present opportunities to accommodate a niche retail offer linked to local industries.

The redevelopment of the site also provides opportunities to deliver an enhanced pedestrian environment centred on Market Square as well as new linkages to surrounding residential areas, including Court view.

It is acknowledged that the multiple ownerships involved would pose a challenge for site assembly, however, given the sites proximity to Market Square and the potential placemaking benefits it could deliver for the Town Core its development should be supported and promoted.

Figure T 2: Image taken from Google Streetview

Opportunity Site 3 - Barrack Street Backlands

Adjoins the Core Retail Area

Backland Site

Town Centre

Good Accessibility at Present

N/A

Has street frontage onto Barrack Street

Opportunity Site 3 is a backland area zoned Town Centre and located to the north of the Main Street and west of Barrack Street. The site comprises a surface car park to the rear of properties fronting the Main Street and also has frontage along Barrack Street.

For a backland site accessibility is good, with direct access, both vehicular and pedestrian from Barrack Street. The site also connects into the SuperValu car park which has direct access, vehicular and pedestrian, from Main Street.

The site is strategically located to form an extension to the Town Core and has the potential to deliver additional retail development and other complementary uses that would consolidate and strengthen the Town Core and its attraction. In addition, a mixed-use development at this location would bring people back living right in the heart of the Town, having impacts on vitality and viability.

The redevelopment of the site also provides opportunities to deliver an enhanced public realm on Barrack Street and an active frontage along a substantial part of the Street. Increasing footfall along Barrack Street would also help address issues with vacancy, including the newer development on the site's eastern boundary.

The site is considered to be a key Town Centre site and a strategic site. Its development should be encouraged and facilitated as an important additional to the Town Centre.

Figure T 3: Image taken from Google Streetview

Muine Bheag (Bagenalstown)

The Core Retail Area of Muine Bheag is largely defined by its historic planned grid layout. This layout in combination with the physical constraints imposed by the River Barrow and the railway line, means that opportunity sites are of a relatively small scale. Identifying sites of varying sizes is in line with the provisions of the Retail Planing Guidelines.

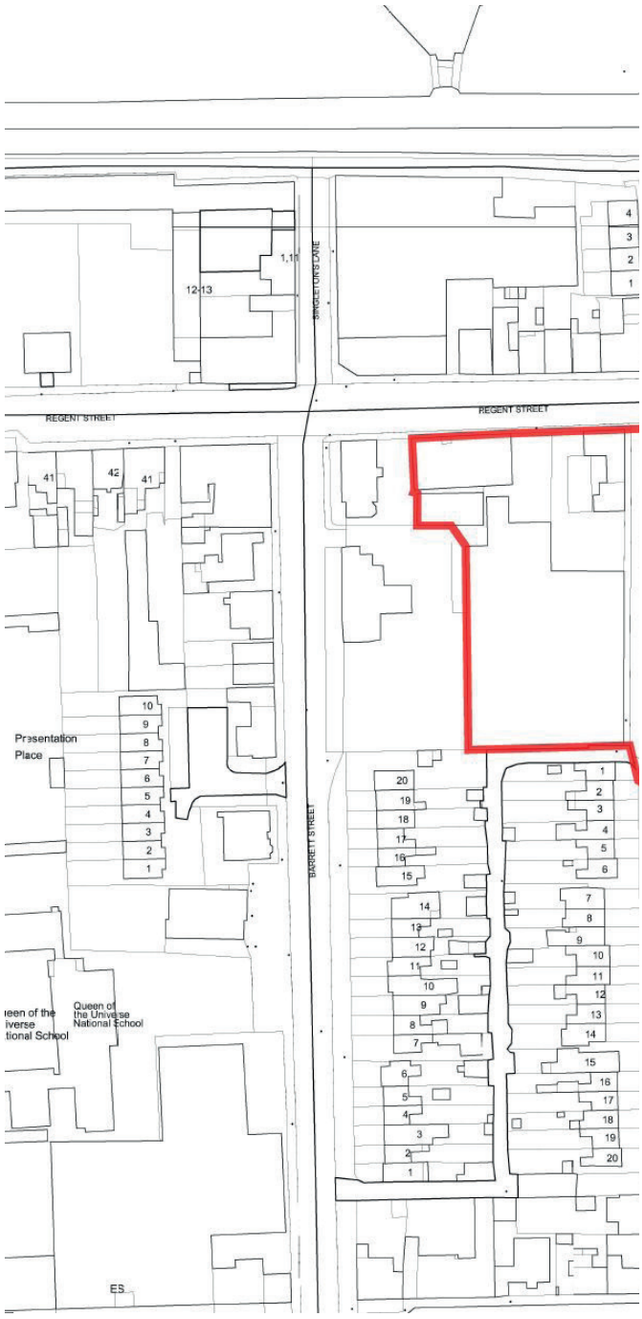
Muine Bheag already has a good convenience retail offer, which was recently supplemented by the opening of the Lidl store to the south west of the Core Retail Area. While the Town would benefit from an improved comparison retail offer, this would be of a scale in keeping with the Town's function in the retail hierarchy. There is thus unlikely to be a requirement for large scale retail development in the short to medium term.

There are sufficient opportunities in terms of the utilisation of vacant Town Centre units and the identified Opportunity Sites to accommodate not just additional comparison retail development in the Town Centre but also complementary uses and new residential development. An extension to the Town Centre is thus not considered necessary, with the identified Opportunity Sites prioritised of development in the first instance.

The delivery of multi-functional places that respond to the emerging trends around community oriented and experiential retailing will be key to the future attraction and vitality of the Town. Promoting the Opportunity Sites for such use will not only support the delivery of a niche retail/tourist offer for Muine Bheag but enhance the overall appearance of the Town as many of the identified sites are vacant or obsolete.

Map MB2 provides the general location of the Opportunity Sites within Muine Bheag, with each site addressed in turn. The Opportunity Sites are identified as appropriate locations to accommodate future retail and/or mixed use development within and adjacent to the Core Retail Area.

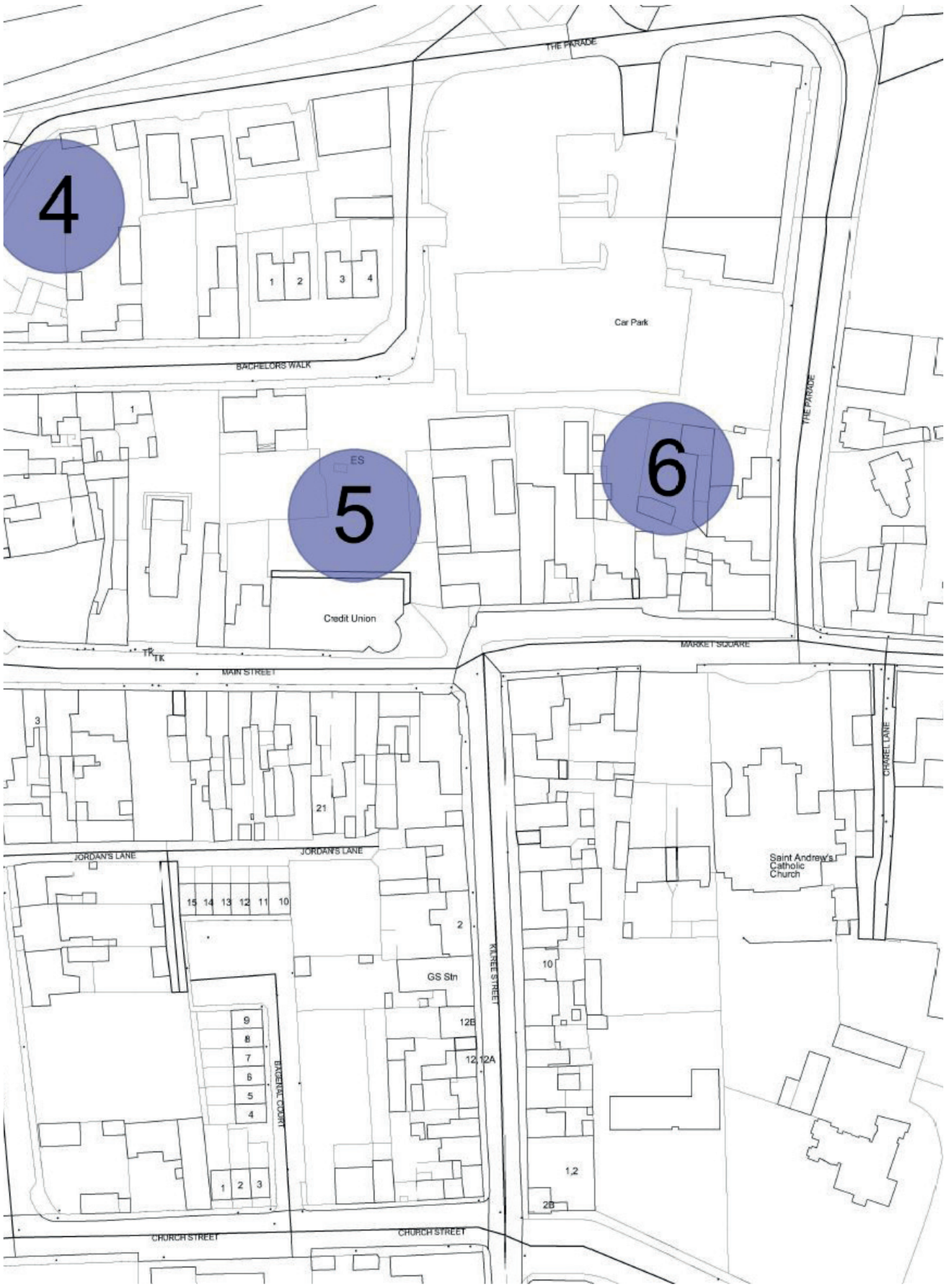
The redevelopment of these sites not only provides the opportunity to consolidate and strengthen the Core Retail Area and wider Town Centre but for enhanced permeability, access to and interaction with the River Barrow and overall public realm improvements.



Map MB1: Muine Bheag Core Retail Area

The opportunity sites at the 'Royal Oak Road' and 'Kilcarrig Bridge' have been omitted as the first is no longer available for development while the latter is removed from the Core Retail Area and Town Centre. The development of these sites is addressed in the Muine Bheag / Royal Oak, Local Area Plan, 2017-2023.

Map MB2: Muine Bheag Opportunity Sites


4
5
6
THE PARADE
BACHELORS WALK
Car Park
Credit Union
MAIN STREET
MARKET SQUARE
JORDAN'S LANE
CHURCH STREET
BAGENAL COURT
KILKEE STREET
CHAPEL LANE
GS Stn
Saint Andrew's Catholic Church

Opportunity Site 1- Quays Area

Edge of Core Retail Area

Warehousing/Industrial Sheds

Town Centre

Good Accessibility

N/A

Was identified with another proximate site as an Opportunity Site in the Muine Bheag / Royal Oak, Local Area Plan, 2017-2023

Opportunity Site 1 is an underutilised site located on the Quays and bound by Regent Street to the south and Singleton's Lane to the west. It currently accommodates a number of warehouses and industrial sheds as well as a retail unit on the corner of Regent Street and Singleton's Lane.

The Muine Bheag / Royal Oak, Local Area Plan, 2017-2023, states that while the area has benefited from some rejuvenation there are still a number of sites that have significant development potential. The LAP recognises this site as an opportunity site for the Town providing the following guidance in relation to its redevelopment:

"A mix of uses in this area is promoted together with specialist and niche retail functions."

It is a strategic site in terms of the rejuvenation of the Quays area and is important in supporting the integration of the area with the Retail Core.

Recent development in the area has delivered new residential units. A mixed-use development would not only present the opportunity to bring more people back living in the Town, but as noted in the LAP would have the potential to deliver additional retail development and other complementary uses, presenting opportunities to accommodate a niche retail offer linked to local industries.

Figure MB1: Image taken from Google Streetview

Opportunity Site 2- Regent Street - Former Bargain City Carpets Site

Core Retail Area

Vacant Retail Unit

Town Centre

Good Accessibility

N/A

The adjacent vacant units fronting Pump Street are separated from this site by the delivery yard for SuperValu

Opportunity Site 2 is a large infill site located on Regent Street. The site is within the Core Retail Area, is zoned Town Centre and was formerly occupied by Bargain City Carpets.

The site currently accommodates a two storey structure of limited architectural character. In line with the provisions of the Muine Bheag / Royal Oak, Local Area Plan, 2017-2023 the site is considered appropriate for infill development. Given its location on the very periphery of the Core Retail Area it is considered appropriate for some retail and other complementary uses that would contribute to the multi-functional role of the Town Centre and present opportunities to accommodate a niche retail offer linked to local industries.

Figure MB2: Image taken from Google Streetview

Opportunity Site 3 - Barrow Lane Site

Edge of Core Retail Area

Warehousing/Industrial/Vacant

Town Centre

Good Accessibility

N/A

Regeneration of this block has already commenced with a new apartment development onto the Quays

Opportunity Site 3 consists of a number of underutilised sites within the eastern portion of the block formed by Regent Street to the south, Barrow Lane to the west, the Quays to the north and Hotel Street to the east. The corner of the block at Barrow Lane and the Quays accommodates a recent apartment development.

The site is zoned Town Centre and currently accommodates a large industrial shed as well as backlands to properties fronting both Barrow Lane and Regent Street. It fronts onto the Quays and Regent Street and has substantial frontage onto Barrow Lane.

A mixed-use development would integrate with the existing modern apartment block, enliven the Quays area and strengthen its character as a new quarter within the Town. The delivery of additional retail development and other complementary uses should consider how they interact with and contribute to the public realm of the Quays as an amenity and tourism attraction for the Town.

The redevelopment of the site also provides opportunities to deliver an improved pedestrian environment, potentially providing permeability through the block and enhancing connections between the Town Centre and the Quays.

Figure MB3: Image taken from Google Streetview

Opportunity Site 4 - Hotel Street Site

Edge of Core Retail Area

Warehousing/Industrial/Vacant

Town Centre

Good Accessibility

N/A

There is potential to provide pedestrian permeability through the site.

A mixed-use development would complement the modern development in the eastern part of this block, enliven the Quays area and strengthen its character as a new quarter within the Town. The delivery of additional retail development and other complementary uses should consider how they interact with and contribute to the public realm of the Quays as an amenity and tourism attraction for the Town. The delivery of niche retailing will be encouraged.

The redevelopment of the site also provides opportunities to deliver an improved pedestrian environment, potentially providing permeability through the block and onto Bachelor's Walk. This would present the opportunity for enhanced pedestrian access directly to the Town Core via the existing pedestrian path adjacent to the medical centre, helping to connect the Quays area and its future development with the Town Centre.

Opportunity Site 4 is a large infill site located in the eastern portion of the block formed by Bachelor's Walk to the south and east, the Quays to the north and Hotel Street to the west. The site is zoned Town Centre and is currently primarily in use as a yard.

The site is accessed via a single vehicular access from the Quays, however, due to its scale and position there is potential to provide an access, from Bachelor's Walk to the south.

Figure MB4: Image taken from Google Streetview

Opportunity Site 5 - Backlands to the North of the Main Street

Core Retail Area

Car Parking/Backland Site

Town Centre

Good Accessibility

N/A

A complex infill site surrounded by development

Opportunity Site 5 is a backland area zoned Town Centre and located to the north of the Main Street. The site comprises a surface car park associated with the Credit Union and the rear of properties fronting the Main Street. It directly adjoins the library site, located to the west.

For a backland site accessibility is good, with direct access, both vehicular and pedestrian, from a side road connecting to Main Street.

The site is considered a suitable location for infill development as it is directly behind the Main Street, with a large portion currently not in active use. Its development has the potential to deliver additional retail development and other complementary uses that would consolidate the Town Core and make it more multi-functional. Such development would have to be considered in the context of the elevated nature of the site, the impact on the adjacent library building, on the new developments onto Main Street and on the medical centre. Opportunities to accommodate a niche retail offer linked to local industries, that attract customers and tourists, should be considered.

The redevelopment of the site could also deliver an enhanced pedestrian environment through the delivery of an enhanced link through the site to Bachelors Walk. With future potential to connect through Opportunity Site 4 onto the Quays. This would not only help integrate the Quays area with the Town Centre but as a potential new residential quarter, it would deliver additional footfall from the Quays directly into the retail core.

It is acknowledged that it is a complex infill site, surrounded by development and part of which is in active use and thus there may be challenges in bringing it forward. However, given the sites proximity to the Main Street and the potential placemaking benefits it could deliver for the Town Core its has been identified as an Opportunity Site.

Figure MB5: Image taken from Google Streetview

Opportunity Site 6 - Backlands to the North of Market Square

Core Retail Area

Retail/Vacant/Backlands

Town Centre

Good Accessibility

N/A

Opportunity to consolidate the historic Town Centre and the newer Aldi development

The site can be accessed directly from Market Square via existing entrances to the rear of properties and it has extensive frontage onto The Parade road, with a pedestrian access onto the Road from Aldi.

The site is considered a suitable location for infill development as it is directly behind the Main Street, located between Market Square and Aldi. Its development has the potential to deliver a new retail and mixed-use Town Centre extension that would connect the historic Market Square with the newer Aldi development, consolidating the Town Core.

The redevelopment of the site also provides opportunities to deliver an improved pedestrian environment, providing direct access from Market Square through to Aldi. This would also have significant placemaking benefits for the Town Centre.

Opportunity Site 6 is a group of sites accessed from The Parade road, consisting of the rear of properties fronting onto Main Street, units onto The Parade Road and a green area immediately south of Aldi. The site is zoned Town Centre.

Figure MB6: Image taken from Google Streetview

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