Comhairle Contae Thiobraid Árann Thuaidh

North Tipperary County Council

Templemore Town Council

Comhairle Baile Dhurlas

Nenagh Town Council

County Retail Strategy 2011

North Tipperary Local Authorities

July 2011

County Retail Strategy Strategic Objective

The central key objective of the Retail Strategy is to support the “town centre” first approach in the context of the retail hierarchy, and to promote the vitality and viability of existing centres by focusing development in them and encouraging a wide range of services in a good environment which is accessible to all.

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EXECUTIVE SUMMARY

1. The previous Retail Strategy was adopted in 2003 and covered the time frame of 2003-2011, whilst the new Strategy extends the period to 2017. The four key requirements of the study are as follows:-
   - to review retail development and retailer trends within North Tipperary since the 2003 Strategy was adopted;
   - to produce up to date information on the quantum and range of retail offer available in the County, and compare it against what was available in 2003;
   - to quantify the need for any additional retail floorspace within the County through to 2017; and
   - to use the results of this assessment to update the North Tipperary Retail Strategy 2003 and to set out policies and recommendations to guide the retail strategies and policy initiatives of the Councils.

2. The Retail Planning Guidelines 2005 (RPGs) recommend that general retail guidelines should not be constrained by administrative boundaries that cut across retail catchment areas, therefore, this County Retail Strategy 2011 has been prepared by North Tipperary County Council on behalf of all of North Tipperary Local Authorities, i.e. Nenagh Town Council, Thurles Town Council, Templemore Town Council and North Tipperary County Council. The North Tipperary Local Authorities will be referred to collectively as 'the Council', hereafter in this document.

3. The previous Retail Strategy was prepared during a period of considerable economic buoyancy and this growth continued through to 2007. Since then, however, the global credit crunch has led to significant economic decline and the on-set of recession. This has manifested itself in many ways including rising unemployment, falling house prices and declining GDP. In turn, the retail economy has been badly affected with a major slow down in retailer demand as a result of falling consumer retail expenditure.

4. Due to the sudden downturn in the economy, the previous Retail Strategy was overoptimistic in its retail expenditure growth assumptions. Similarly, the Strategy significantly under-estimated the growth in special forms of trading (including internet shopping).

5. The pace of new build combined with the economic downturn has led to an existing over-supply of retail floorspace stock in the County with each urban area experiencing vacant retail space. In addition, the construction of several significant new retail schemes around the County have not commenced and it is unclear whether they will start in the near to medium future. Moreover, given the adverse economic conditions, it is estimated that many of the retailers across the County are currently under-trading, and therefore must capture some of the future growth in spend in order for them to return to previous levels of trading viability.

6. Reflecting this already considerable volume of retail floorspace, it is not altogether surprising that a new household survey carried out as part of a review of retailing in the Mid-West Region as part of the Mid West Retail Strategy confirms that North Tipperary retains a very high proportion of its retail expenditure, with just a balance of 18.1% of market share for non-bulky comparison leaking to other centres, 4.5% bulky comparison leaking to other centres and 6.1% convenience inwards from other centres (Retail Strategy for the Mid West Region 2010-2016 Appendix 3E Summary of Market Share Data by Centre and Zone). This leaves little scope to clawback trade in support of new retail floorspace in the future.

7. In order to maintain and grow their market share, the towns within the County need to focus on their real catchments which tend, in the main, to be relatively concentrated. To service essentially local needs, these centres should cater primarily for daily shopping and offer convenience goods, high quality speciality goods, quality comparison goods and a range of services.

8. Unlike the presence of national convenience stores throughout the County, the comparison market is primarily focused on local, independent stores, with only a limited presence of national and multi-national chains.

9. Specialty shops, and the development of a brand led shopping and culinary destinations has been shown to offer new markets and a wider catchment for towns within the County.

10. Mindful of certain weaknesses in the technical analysis underpinning the previous Retail Strategy, the Mid West Regional Authority, together with Limerick County Council, Limerick City Council and Clare County Council carried out a quantitative assessment of retail floorspace need within the Region, including North Tipperary to inform their new Strategy, which was built on a platform of new data, including a new household telephone survey, health checks of key centres and the latest population projections. In addition, *Oxford Economics* produced bespoke forecasts of the growth in consumer retail expenditure per head in the Mid West Region by broad category of goods. This takes into account the recent economic downturn and the much lower expectations of spending growth in the future and is not a projection of past trends or performance. Given that this is recently published documentation it is proposed to accept this data as a baseline and update it accordingly to feed into the preparation of this document.

11. The retail floorspace needs assessment also takes into account the existing retail development in the pipeline throughout the County. These retail pipeline commitments (schemes under construction or with planning consent as per Mid-West Regional Authority, Retail Strategy for the Mid-West Region, 2010) total some 31,227 sq m net and represent (if built) a 32% addition to the current stock. However, in view of current economic circumstances it is unlikely that all existing retail schemes in the pipeline will proceed to completion and full occupation. Accordingly, need has been determined on the basis of including and excluding retail commitments.

12. Due to the Mid-West already being over-shopped (MWRS, 2010), the huge scale of the retail development pipeline and the limited forecast growth in consumer retail expenditure per head through to 2016, the quantitative assessment indicates that there is no need for any further retail floorspace provision through to 2016 (the end date of the new Mid-West Retail Strategy). However, at the County or city level the Strategy recognises a need in certain locations for specific categories of goods, particularly if retail commitments are excluded. Qualitative need may also emerge as a factor in determining what is the most appropriate scale and distribution of any new retail development at the local level. The Mid West Regional Planning Guidelines, adopted in September 2010, states that in relation to Retailing:

    "The amount of retail development that has been approved but not yet constructed is substantial, and, combined with the existing retail facilities there is no need for any additional retail floor space in the Mid West Region as a whole through to 2016 (the end date of the current Retail Strategy). The only exceptions with respect to non-bulky and bulky comparison goods floor space at 2022, for which there is a modest level of need."

    "In the smaller rural centres of the Region, the Guidelines suggest that a positive approach to promoting new small scale development should be pursued to ensure local people have access to shopping facilities which will meet their day to day needs. There is a strong case for strengthening

the position of Limerick City Centre in the regional shopping hierarchy. This is best achieved through actively planning for additional non-bulky comparison goods floor space in the centre…The growth or retention of retailing in established city and town centres is supported, as a basis for development consolidation."

"The Mid West Region is now at a crossroads where if further uncontrolled/unrestricted retail development is allowed there will be a detrimental impact to Limerick City Centre…"

13. The County Development Plan 2010-2016 responds to the effects of recent development by acknowledging the importance of Limerick City Centre at the top of the regional hierarchy. Policy ECON 19a on Regional Shopping states:

    "It is the policy of the Council to support the position of Limerick City as the key retail centre in the Mid West Region."

14. In the towns of Nenagh, Thurles, Roscrea and Templemore, the strategy is to enhance the town centre shopping offer through the introduction of modern shop units whilst protecting and enhancing the towns attractive characters. It is also proposed that an improved focus of comparison goods retailing be achieved in suitable designated areas to secure a qualitative improvement in provision. Limited new convenience floorspace is required within these towns and should be located having regard to the sequential approach.

15. In Borrisokane and Borrisoleigh the retail provision should be considered in the context of ensuring that the towns' role as a market town for their catchment continues.

16. Elsewhere in the County the general approach is to improve provision to support the existing role of the towns and the level of service they provide to their local catchment populations, including where relevant their tourist and visitor functions.

17. The successful implementation of the Retail Strategy is dependent upon cross-boundary co-operation between the Councils.

1.0 INTRODUCTION

This County Retail Strategy 2011 has been prepared in accordance with the 'Retail Planning Guidelines for Planning Authorities' (hereafter referred to as the RPGs), published by Department of the Environment, Heritage and Local Government (DoEHLG) in 2005. The RPGs recommend that the Council prepare a general statement of strategic intentions and future policy for retailing across the County. Regards has also been had to the Mid West Regional Planning Guidelines 2010 and to the adopted retail strategies of the Counties surrounding North Tipperary.

1.1 Retail Planning Guidelines 2005 (RPGs)

The RPGs state that retail development should be guided by Development Plans and that retail policy should set out five key objectives which have equal weight, as follows:

(i) To ensure that all development plans incorporate clear policies and proposals for retail development.

(ii) To facilitate a competitive and healthy environment for the retail industry of the future.

(iii) To promote forms of retail development which are easily accessible, particularly by public transport, in a location which encourages multipurpose shopping, business and leisure trips on the same journey.

(iv) To support the continuing role of town and district centres as the preferred location for retail development due to better accessibility for both public transport and the private car.

(v) A presumption against large retail centres located adjacent or close to existing, new or planned national roads/motorways.

The RPGs state that the matters to be addressed in all Retail Strategies are:

- Confirmation of the retail hierarchy, the role of centres and the size of the main town centres;
- Definition of the boundaries of the core shopping area of town centres;
- A broad assessment of the requirement for additional retail floorspace;
- Strategic guidance on the location and scale of retail development;
- Preparation of policies and action initiatives to encourage the improvement of town centres; and
- Identification of criteria for the assessment of retail developments.

1.2 Relationship with other Plans and Guidelines

The County Retail Strategy forms part of a hierarchy of national, regional and local level plans. In preparing the County Retail Strategy the Council has had regard to all Ministerial Guidelines in addition to the relevant policies and objectives set out in the following principle documents;

- North Tipperary County Development Plan 2010 - 2016
- Mid-West Regional Planning Guidelines 2010
- County Retail Strategy 2003
- National Spatial Strategy 2002
- National Development Plan 2007-2013
- Sustainable Development: A Strategy for Ireland 1997
- Retail Planning Guidelines for Planning Authorities 2005
- National Roads Authority – Policy Statement on Development
- Spatial Planning and National Roads – Draft Guidelines 2010
- Management and Access to National Roads, 2006
- Smarter Travel
- Nenagh Town and Environs Development Plan 2007
- Thurles Town and Environs Development Plan 2009
- Templemore Town and Environs Development Plan 2006
- Newport Local Area Plan 2010
- Western Area Local Area Plan 2006
- Roscrea Local Area Plan 2006
- Ballycurrane Local Area Plan 2006
- Holycross Local Area Plan 2006

1.3 Statutory Basis for this County Retail Strategy

Development Plans have been prepared for each of the North Tipperary Local Authorities and five Local Area Plans have been prepared within the County. The inclusion of detailed policies for retail development is set out within each Development Plan and Local Area Plan. There is no statutory process for preparation and adoption of this County Retail Strategy. Where reference is made to the County Retail Strategy in any existing Development Plan or Local Area Plan, it shall be assumed that this refers to this County Retail Strategy 2011 and any further review of the County Retail Strategy.

The Council has decided to prepare a County Retail Strategy because retail planning requires consideration of the catchment areas of retail centres which do not coincide with local authority boundaries. However, the RPGs state that North Tipperary, being a rural county, is not required to prepare a detailed retail planning strategy. The RPGS state that in respect of rural areas;

'a more general statement of strategic intentions and future policy will be required and that it should not be necessary to estimate in any detail the future requirement for additional development. A broad assessment of requirements for additional development reflecting the local evidence of market interest and the need to provide good opportunities for retail provision to serve the main settlement centres in the county ought to be sufficient in order to formulate appropriate polices and criteria for dealing with new development proposals'.

1.4 Contents and Layout of the County Retail Strategy

This County Retail Strategy 2011 is set out in seven chapters. **Chapter One** outlines the statutory basis for the review of the County Retail Strategy 2003.

Chapter Two is a review of baseline data and forms the basis for an assessment of demand for additional retail floorspace. Per capita expenditure levels in the county, figures for current floorspace and population projections are discussed.

An existing floorspace assessment, assessment of the nature of retailing in the county and detailed health check for retailing in each of the main county towns is outlined in **Chapter Three**.

Chapter Four describes the County Settlement Strategy as set out in the County Development Plan 2010-2016. Considering the County Settlement Strategy, the County Retail Hierarchy is outlined. A key element of this County Retail Strategy is the active achievement of a clear County Retail Hierarchy based on the findings set out in Chapter 3.

Strategic guidance on the nature, location and scale of new retail development as set out in the current Development Plans and Local Area Plans and criteria for assessment of new retail development is set out in **Chapter Five**.

Action initiatives for town and village centre improvement for settlement centres are set out in **Chapter Six**.

Finally, **Chapter Seven** presents some key conclusions.

Appendices are set out to the back of the document. **Appendix One** outlines an annual monitoring scheme for retailing in the County. **Appendix Two** outlines a detailed methodology for an annual primary retail area health check in each of the main county towns. A Glossary of Terms is set out in **Appendix Three**.

2.0 REVIEW OF BASELINE DATA

2.1 Introduction

The North Tipperary County Development Plan 2010-2016 sets out the population projections for North Tipperary to 2016. The population growth targeted for North Tipperary in the Regional Planning Guidelines 2010 was 14,700 between 2006 and 2022 or an average of 918 per year. This projected population increase is indicative of a projected increase in demand for retailing. However, trends in expenditure per capita in the county will influence the extent to which population increase actually increases demand for goods and commodities. This County Retail Strategy sets out details of the increase in floorspace dedicated to retailing across the county since the preparation of the County Retail Strategy 2003. An examination of population projections, expenditure per capita trends and recent growth across the retail sector are indicators of current and future demands for new retail development in the county.

2.1.1 Study Approach

The updating of the Retail Strategy 2003 involved combining new analytical research, with recent market trends and retail planning expertise. Although the study has regard to existing plans and policy documents and recent retail developments, it nevertheless seeks to adopt a new approach to the formulation of an updated and revised Retail Strategy for North Tipperary by incorporating experience of current retail planning policy alongside the production of new data on the retail sector.

There have been several key stages in the preparation of this strategy, with the timing of some aspects tapered accordingly to ensure that the findings of the review take into account relevant guidance from national and regional documents.[1]

- Demographic Analysis

An analysis of existing and future population and levels of retail expenditure by residents of North Tipperary was undertaken as part of the review of the Mid-West Retail Strategy by Limerick County Council, Limerick City Council and Clare County Council to establish the scale of the requirement, which the Retail Strategy needs to address. The figures as they relate to North Tipperary have been assessed in this Strategy.

- Policy Context

A comprehensive assessment of the national and regional policy context has been prepared to ensure a consistent approach in the North Tipperary Retail Strategy.

- Consultation

The survey work will be combined with a focused programme of wider local consultation, including requests for written representations from the local Chambers of Commerce, retailers, businesses and other interested parties in the county.

The written consultation will assist in finalising the development of the strategy with specific local views of the performance of each of the town centres, including wider perceptions of the provision of retail and other services.

- Town Centre Assessment

Town centre health check assessments were undertaken in Nenagh, Thurles, Roscrea and Templemore, Newport, Borrisokane, Ballina, Cloughjordan and Borrisoleigh.

Having regard to the Settlement, Retail and Economic Hierarchy in the County Development Plan 2010-2016 and the Retail Hierarchy in the Mid West Regional Planning Guidelines, it was considered that town centre health checks should be prioritised for the four main towns within the County and the towns identified as Secondary and district Service Centres. The other settlements such as Holycross, Littleton, Toomevara and Two Mile Borris should be considered and assessed on a case by case basis having regard to the overall context and bearing in mind this retail strategy.

[1] These include the Regional Planning Guidelines, the review of the Mid-West Retail Strategy and the review of the National Spatial Strategy.

- Survey

Building on the previous survey and research for the Retail Strategy 2003, floorspace information for each of the centres was reviewed and updated.

- Strategy and Policy Recommendation

Strategy and policy recommendations are brought forward to guide future retail development across North Tipperary and its main centres.

2.2 Population

The population of North Tipperary exceeded 66,000 in 2006 for the first time since 1926. The population growth for the county over the period 2002-2006 was 8.2% and the population of North Tipperary now accounts for 18.28% of the total for the Mid-West Region. The population growth of 8.2% from 2002-2006 in North Tipperary is viewed positively and indicative of likely sustained population growth in future periods.

The Mid West Region had a total population of 361,028 in 2006 up from 339,591, an increase of 21,437 or 5.8%. The County therefore accounts for 18.28% of the mid-west regional population (an increase from 17.98% in 2002) and 1.55% of the national population unchanged from 2002. Table 2.1 shows the changes in population in urban and rural areas between 1996 and 2006. It demonstrates that the urban / rural division of population in North Tipperary has remained almost the same between 2002 and 2006 with 54.4% of the population living in rural areas in 2006. This compares to a National figure of 39.3% in rural areas.

Table 2.1 Population Distribution in North Tipperary

Settlement	'96	%	02	%	'06	%
Thurles TC	6,603	11.3	6,852	11.23	6,831	10.34
Environs of Thurles	336	0.58	573	0.94	851	1.28
Nenagh TC	5,645	9.73	6,121	10.03	7,415	11.23
Environs of Nenagh	268	0.46	333	0.55	336	0.33
Roscrea	4,170	7.19	4,578	7.50	4,910	7.43
Templemore TC	2,115	3.65	2,159	3.54	2,255	3.41
Environs of Templemore	129	0.22	111	0.18	129	0.19
Total Towns	**18,533**	**31.9**	**19,710**	**32.3**	**21,411**	**32.4**
Total Town Environs	**733**	**1.26**	**1,017**	**1.67**	**1,316**	**1.99**
Total Small Settlements	**6,063**	**10.4**	**8,247**	**13.52**	**8,728**	**12.7**
Settlement Total	**24,596**	**42.4**	**27,957**	**45.8**	**30,139**	**45.6**
Rural Total	**33,425**	**57.6**	**33,396**	**54.2**	**35,884**	**54.4**
North Tipperary Total	**58,021**		**61,010**		**66,023**	

Table 2.2: CSO Unemployment Rate
Seasonally Adjusted Standardised Unemployment Rates (SUR)

	2005	2006	2007	2008	2009	2010
Annual Average	4.4	4.4	4.6	6.4	11.8	13.3

2.3 Expenditure per Capita

Expenditure per capita is an estimate of the total expenditure per person in a particular area. Such figures are useful to determine the total available expenditure in a county based on its population. Retail Strategies and Retail Impact Statements undertaken in recent years have used the figures supplied under the Household Budget Survey which is produced by the Central Statistics Office (CSO) to calculate expenditure per head of population per annum. This survey was last carried out in 2004/2005 and it was found that the estimated average weekly expenditure in 2004-2005 for all households in the state was €787.12. This was over 36% higher than the €577.72 recorded for the previous survey in 1999/2000. The Household Budget Survey is carried out every five years, therefore, the next survey was due in 2010, data collection continuing until August 2010, and thus, updated figures for expenditure per capita are not yet available from the CSO. However, in the interim period careful examination of key economic indicators provides evidence that the average weekly expenditure has declined and is now similar to 2004/2005 levels after reaching peak levels in 2007.

Economic trends in the intervening years, notably the economic confidence of 2006/2007 and the more recent economic downturn of 2008/2010 and increasing unemployment rates (National unemployment rates for 2005 and 2006 were 4.3% and 4.4% respectively, whereas unemployment for December 2010 was recorded at 13.4%) suggest that any increase in expenditure per capita since 2005/2006 has been eroded in the current economic climate.

The CSO publishes seasonally adjusted indices of the value and volume of retail sales in the country by retail business type and combined business group. This is called the Retail Sales Index. The value of retail sales decreased by 19.9% in January 2009 compared to January 2008. It was found that the volume of retail sales decreased by 20.4% in January 2009 compared to January 2008. Details of the Retail Sales Index by Volume and by Value during the period 2004-2009 are set out below;

Table 2.3 Value of Retail Sales

Year	Retail Sales Index	Annual % Change
2006	108.1	8.1
2007	116.0	7.3
2008	110.8	-4.5
2009	90.9	-18.0
2010 (Nov)	90.1	-4.1

Table 2.4 Volume of Retail Sales

Year	Retail Sales Index	Annual % Change
2006	107.3	7.3
2007	114.7	6.9
2008	107.7	-6.1
2009	92.6	-14.0
2010 (Nov)	93.4	0.9

The retail sales index peaked in 2006/2007 for both value and volume of retail sales and since then has dropped. However, current trends indicate that figures for retail sales may still be decreasing in line with the economic downturn.

The CSO National Accounts were published in June 2009. It was found that consumer spending (personal consumption of goods and services) in volume terms was 9.1 per cent lower in the first quarter of 2009 compared with the same period

in 2008. These figures support the assumption that expenditure per capita levels are decreasing.

The Annual Services Inquiry (ASI) is published every year since 1991 and provides estimates of economic activity in the services sectors. However, the ASI final figures are published 22 months after the end of the reference period; therefore, figures for 2007 were published at end of 2009. It is considered that figures for expenditure per capita recorded in 2007 do not accurately reflect the current economic situation.

It is concluded that in the absence of current CSO statistics for expenditure per capita and considering figures for retail sales and trends in consumer spending, that the 2004/2005 figures for expenditure per capita (based on the Household Budget Survey) are now the most reasonable indicator of expenditure trends and will be acceptable for the purposes of Retail Impact Assessments until the CSO publishes its new figures for expenditure per capita.

2.4 Retail Floorspace within the County

The Annex 1 of the Retail Planning Guidelines 2005 (RPGs) identifies three categories of retail goods that can be identified and quantified based on the amount of retail floorspace dedicated to each. These three categories are defined as follows:

(a) Convenience Goods:

- Food
- alcoholic and non-alcoholic beverages
- tobacco
- non-durable household goods

(b) Comparison Goods

- clothing and footwear
- furniture, furnishings and household equipment (excluding non-durable household goods)
- medical and pharmaceutical products, therapeutic appliances and equipment
- educational and recreation equipment and accessories
- books, newspapers and magazines
- goods for personal care and goods not elsewhere classified

(c) Bulky Goods (Retail Warehousing)

Goods generally sold from retail warehouses where DIY goods or goods such as flatpack furniture are of such a size that they would normally be taken away by car and not be manageable by customers travelling by foot, cycle or bus, or that large floor areas would be required to display them e.g. furniture in room sets, or not large individually, but part of a collective purchase which would be bulky e.g. wallpaper, paint.

These three distinct categories of retailing can be identified across the county, and the total floorspace dedicated to each has been estimated.
A detailed floorspace survey of the county's main centres was undertaken in December 2001 by DTZ Sherry Fitzgerald as part of the County Retail Strategy 2003. This assessment indicated that there was approximately 51,5765sq m of retail floorspace (this figure includes both occupied and vacant floorspace) within the main settlement centres of the county.
The total amount of floorspace was categorised in Table 2.4 as follows;

Table 2.4 Composition of existing retail floorspace 2001/2009

Location		Nenagh Total (sq.m)	Roscrea Total (sq.m)	Thurles Total (sq.m)	T'more Total (sq.m)	Other Towns Total (sq.m)	**North Tipperary Total (sq.m)**
Existing Convenience	**Dec-01**	8,240	4,156	7,323	1,724	0	**21,443**
Convenience Built Since	**Jan-04**	5,206	1,977	4,646	1,345	1,496	**14,670**
Existing Occupied Convenience	**Mar-09**	13,446	6,133	11,969	3,069	1,496	**36,113**
Pipeline Convenience		0	0	1,800	0	3,987	**5,787**
Existing occupied plus Pipeline Convenience		13,446	6,133	13,769	3,069	5,483	**41,900**
Existing Non-Bulky Comparison	**Dec-01**	9,153	5,514	9,338	682	0	**24,687**
Non-Bulky Comparison Built Since	**Jan-04**	3,129	1,721	0	0	1,152	**6,002**
Existing Occupied Non-Bulky Comparison	**Mar-09**	12,282	7,235	9,338	682	1,152	**30,689**
Pipeline Non-Bulky Comparison		0	517	10,000	0	6,189	**16,706**
Existing Occupied plus Pipeline Non-Bulky Comparison		12,282	7,752	19,338	682	7,341	**47,395**
Existing Bulky Comparison	**Dec-01**	0	0	2,059	3,387	0	**5,446**
Bulky Comparison Built Since	**Jan-04**	6,582	4,580	12,854	0	0	**24,016**
Existing Occupied Bulky Comparison	**Mar-09**	6,582	4,580	14,913	3,387	0	**29,462**
Pipeline Bulky Comparison		0	5,808	2,926	0	0	**8,734**
Existing Occupied plus Pipeline Bulky Comparison		6,582	10,388	17,839	3,387	0	**38,196**
All Existing Retail	**Dec-01**	17,393	9,670	18,720	5,793	0*	**51,576**
All Retail Built Since	**Jan-04**	14,917	8,278	17,500	1,345	2,648	**44,688**
All Existing Occupied Retail	**Mar-09**	32,310	17,948	36,220	7,138	2,648	**96,264**
All Pipeline Retail		0	6,325	14,726	0	10,176	**31,227**
All Exiting Occupied plus Pipeline Retail		32,310	24,273	50,946	7,138	12,824	**127,491**

Note: * Not seen to be an accurate figure as the figure does not reflect other towns outside of the four main towns.
Source: DTZ Sherry FitzGerald Floorspace Survey, December 2001 and Council /Colliers CRE figures and estimates, 2009.

Table 2.5 Percentage change for total retail floorspace from 2001 to 2009 in the settlement centres

		Nenagh Total %	Roscrea Total %	Thurles Total %	T'more Total%	Other Towns Total %
All Existing Retail	**Dec-01**	33.7	18.7	36.3	11.2	0
All Retail Built Since	**Jan-04**	33.4	18.5	39.2	3.0	5.9
All Existing Occupied Retail	**Mar-09**	33.6	18.6	37.6	7.4	2.8
All Pipeline Retail		0	20.3	47.2	0	32.6
All Existing Occupied plus Pipeline Retail		25.3	19	40	5.6	10.1

2.4.1 Permitted Retail Floorspace in the County

Table 2.4 indicates that there is now approximately 96,264sqm of retail floorspace in the main shopping destinations with a further 31,227sq.m in the pipeline. In 2001 there was a total of approximately 51,576sqm retail floorspace in the county. The total retail floorspace has more than doubled across the county in the intervening years to 2009.

2.5 Retail growth among the Main Shopping Destinations

An analysis of Table 2.4 allows for an assessment of comparative growth rates among each of the main shopping destinations. Table 2.5 sets out the percentage change in total retail floorspace share among each shopping destination over the period December 2001 to March 2009. The assessment of the relative percentage share of total retail floorspace within each shopping destination is a good indicator of their performance and growth since 2001.

2.6 Conclusion

In line with the provisions of the RPGs a broad assessment of factors that influence demand for additional floorspace has been carried out. The significant issues that are apparent are as follows;

(A) As per DoEHLG targets that the population will continue to grow across the region, however, reduction in expenditure per capita may offset an increase in total expenditure which would be expected as a result of population growth, until a time that economic recovery contributes to an increase in expenditure per capita.

(B) Total retail floorspace in the main county towns has almost doubled from a figure of 51,576sqm in 2001 to 96,264sq.m in 2009. The strongest retail growth area was bulky comparison which increased from 5,446sqm to 29,462sqm, followed by growth in convenience retailing which increased from 21,443sqm to 36,113sqm, growth in non-bulky comparison retail floorspace was also significant from 24,687sqm to 30,689sqm.

(C) In 2001 it was found that Nenagh Town supported 34% and Thurles Town supported 36% of the total retail floorspace across the main shopping destinations in the county. In 2009, Thurles increased its share of total retail floorspace to 38% and Nenagh maintained at 34%. This illustrates the importance of

Nenagh and Thurles as the main retailing centres of the county.

(D) The percentage share of total retail floorspace located in Roscrea remains at 19%. However, in 2010 construction started for a new shopping centre which enhances the overall catchment offer associated with the town and the enhancement of linkages between Birr and Templemore has potential to strengthen the position of the town in the county retail hierarchy.

(E) The percentage share of total retail floorspace located in smaller settlements has decreased from 11% to 10%. This is indicative of the role of the smaller settlements as local retail centre only which serves the basic convenience needs of its catchment, retention of basic convenience consumer retailing in these smaller settlements should be promoted.

3.0 NATURE OF RETAIL PROVISION IN THE COUNTY

Ireland has witnessed unprecedented rates of economic growth since 1990; however, economic downtown since 2008 has dramatically affected retail trends in the Country. It is important to examine closely retail trends in the County in order to set out an effective strategy for retail development.

Economic growth was manifested in the retail sector through both provision of increased floor space and development of new trends/types of retailing not previously present in the retail market. Outlined below is a summary of the key emerging trends:

Reduction in the Number of Small Independent Retailers
This has been the trend across the country and was identified in the County Retail Strategy 2003. A number of factors underpin this with competition from national and international multiples and symbol group stores (Spar, Centra, Mace, etc) being a main feature of the trend.

Reduction in number of small local convenience outlets in rural settlements
It is apparent that there is a decreased reliance on local rural convenience shops; this is evident in the number of rural settlements that no longer have convenience outlets. Local convenience outlets play a vital role in community self-sufficiency especially for those without access to public transport.

Increased Concentration among Fewer Multiples/Operators
There is evidence that this is happening throughout the County for main food shopping. The trend of shopping in national and international brand foodstores of a medium to larger floorspace can be seen through the increased representation of retailers such as Dunnes Stores and Tesco and the discount operators Aldi and Lidl in the main County towns. This trend is further marked by intense competition between these retailers and by strong advertising campaigns.

Emergence of mixed-goods retailing
Mixed Goods Retailing refers to comparison retailers whose offer includes a large range of non-bulky or high-end comparison goods. This form of retailing has implications for retailing policy and creates uncertainty as to whether stores should be classified as bulky goods or comparison goods outlets and whether they are best located in the town centre or on out-of-centre locations. In determining the definition of bulky goods retailing, the Council will require the operator to demonstrate that they specialise in the sale of bulky-goods.

Convenience Stores selling Comparison Goods
The proportion of convenience store space given over to selling comparison goods rather than to traditional convenience goods such as food is on the increase. With an increase in comparison goods sales there will be a need for additional convenience store space.

The Emergence of New Forms of Retailing especially in out of centre locations

These may include retail warehousing, retail parks, Factory Outlet Centres (FOCs), warehouse clubs, e-retailing etc. In North Tipperary these new forms of retailing have generally been limited to out-of-town retail warehouse development, sometimes coupled with out-of-town or edge-of-town convenience anchor stores. In 2001, retail warehousing was identified as being relatively underprovided for in the County. However, in the interim period there has been a significant increase in retail warehouse floorspace provision (see Table 3.3).

3.1 Brand Names

The examination of large-format convenience store brand names in each of the county towns is a good indicator of how each town is providing for the convenience retail needs of its catchment and whether or not expenditure leakage is occurring from the catchment. Table 3.1 illustrates locations of brand name stores across the county.

Table 3.1 Convenience Store Brand Names in the County Towns

Town	Brand Names	Comment
Nenagh	Tesco, Dunnes Stores, Lidl, Centra	Nenagh is very well represented by brand name stores; this supports its role as main county town. Other comparison and convenience retailers have expressed interest in locating in the town.
Thurles	Tesco, Dunnes Stores, Lidl, Aldi, Centra, Costcutters	Thurles is very well represented by brand name stores; this supports its role as a market town.
Roscrea	Tesco, Dunnes Stores, Lidl, Supervalu	Roscrea is well represented by brand names. Dunnes Stores has recently located in Roscrea thereby expanding the retail choice in the town. Also, Tesco have recently started construction on a new store for the town
Templemore	Lidl, Centra, Spar, Costcutters	Templemore is under represented by brand names, especially, when compared with Roscrea.
Borrisokane	Spar	Local and village shops have an important role serving the convenience shopping requirements of local communities.
Borrisoleigh	Gala, Centra , Costcutters	Smaller format stores located in Borrisoleigh offer choice for convenience retailing in Borrisoleigh. Local and village shops have an important role serving the convenience shopping requirements of local communities.
Ballina	Mace, Londis	Local and village shops have an important role serving the convenience shopping requirements of local communities.
Newport	Daybreak, Centra	Local and village shops have an important role serving the convenience shopping requirements of local communities.
Cloughjordan	Centra	Local and village shops have an important role serving the convenience shopping requirements of local communities.

3.2 Shopping Centres

As a result of demand for new custom built shopping centres catering for large format anchor convenience stores and small comparison units, new shopping centres have been developed in the county. The provision of new shopping centres in the County town of Nenagh and in other centres is in line with the objectives of the RPGs and the County Retail Strategy 2003, which aimed to direct new large-scale retail development to urban areas. These developments have provided sites for many of the large brand name convenience retailers set out in Table 3.1. A new, extended shopping centre has been developed in Thurles. Shopping centres are characterised by an anchor convenience store, non-bulky goods comparison units and car parking. Such large formats are not easily accommodated within the central areas of towns due to physical constraints. The development of shopping centres ensures that existing urban centres can retain expenditure potential within their catchments and has enhanced the status of the towns of the county as retail centres.

The RPGs define edge-of-centre and out-of-centre locations as;
Edge-of centre: 'A location within easy walking distance (usually not more than 300 –400 metres) of the PRA of a town centre, and providing parking facilities that serve the centre as well as the new development thus enabling one trip to serve several purposes'.

Out-of-centre: 'A location that is clearly separate from a town centre but within the urban area, including programmed extensions to the urban area in approved or adopted development plans'.

The shopping centres of Nenagh, Thurles and Roscrea are located proximate to the defined 'easy walking distance' (RPGs) of the Town Centre prime pitch locations, and it is considered that they have enhanced the draw of custom to each of these towns and to their central areas. There are no shopping centres located on any out-of-centre sites.

In order to further develop and enhance town centre retailing, a focus of this County Retail Strategy will be on the promotion of retailing though the development of linkages and beneficial synergies with new shopping centres and town centre prime pitch areas. (See Chapter 6.0 Action Initiatives for Town Centres).

Table 3.2 Nature and locations of shopping centres

Town	Shopping centre	Comment
Nenagh	O'Connors Shopping Centre	Location approximately 200 metres from the edge of the primary retail area. Shopping Centre anchored by O'Connors Store with several independent retail units and Lidl located 50m to the rear.
Thurles	Thurles Shopping Centre	Location approximately 400 metres from the edge of the primary retail area. Shopping Centre anchored by Dunnes Stores with several independent retail units.
Roscrea	Roscrea Shopping centre	Located within the primary retail area, anchored by Tesco.
Templemore	N/A	

3.3 Retail Warehousing

As set out in Chapter Two above, there has been a new trend towards the construction of retail warehouse parks. The RPGs define a retail warehouse park as: *'A single development of at least three retail warehouse units with associated car-parking'*.

Retail warehouse units are defined as: '*Large single-level stores specialising in the sale of bulky household goods such as carpets, furniture and electrical goods, and bulky DIY items, catering mainly for car-borne customers and often in out-of-centre locations'*.

Mixed use industrial and retail warehouse parks have been developed in Nenagh, Thurles and Roscrea.

Dedicated retail warehouse floorspace has been permitted in three of the main towns, thus, increasing the variety and choice for comparison retailing in these centres. General non-retail warehouse developments have also occurred in each of the main towns. Inspection of these general warehousing developments indicate that in some instances there is pressure to locate retail warehouse units and comparison retail uses in such units, despite their permission as warehouse units. This highlights a need for clear differentiation between retail warehousing, warehousing and comparison retailing of non-bulky goods and clear vision for retail development within this Strategy and the relevant Development Plans.

In addition, there is pressure from retailers of non-bulky goods to open stores in out-of-town retail warehouse units. The RPGs state that retailing of non-bulky goods should be directed to town centre locations and that retail warehousing should be designed to cater for the sale of bulky goods and car borne custom therefore, appropriate assessment of planning applications at planning stage, use of appropriate conditions and long-term enforcement procedures should be considered to ensure that retail warehousing is designed for and confined to the sale of bulky goods as defined by the RPGs.

Table 3.3 Locations and nature of retail warehouse parks

Town	Retail/ Industrial Parks	Comment	Built or Not Built
Nenagh	Springfort	Planning Ref. : N4101	
		• A total of 6 no. retail warehouse units (5 no. with of 700 sq.m. each and 1 no. retail warehouse unit of 3,252sq.m. with ancillary garden centre of 930sq.m.)	• Built
		• A food store of 1,445 sq.m. gross floor area having a net retail floor area of 1,135 sq.m. and ancillary coffee shop of 176 sq.m,	• Built
		• A bowling centre with 7 lanes (850 sq.m.) and at first floor a Cineplex (4 screens with 772 seats – 1,554sq.m.)	• Not Built
		• Drive thro' restaurant with a floor area of 213 sq.m.	• Built
		• 84 bed hotel with leisure centre with 225 parking spaces	• Not Built
		• Advance technology unit of 2,945 sq.m. with 59 parking spaces	• Not Built
		• 18 distribution warehouse/light industrial units with car parking	• Built
		• Medical Centre – 1600sq.m. with 28 car parking spaces	• Not Built
		• Nursing home with 50 bedrooms and 36 car parking spaces	• Not Built
		• 38 sheltered housing units in 7 blocks with 48 car parking spaces	• Built

		• Crèche No.1 – 372sq.m. for 65 children with 11 car parking spaces • 2 motor showrooms with 16 car parking spaces each (not built to date) • Auto Parts Unit – 897sq.m. with 45 car parking spaces Planning Ref: N/4080 Wholesale Warehouse and yard (99,457sq.ft.)	• Built • Not Built • Not Built • Built
Thurles	Racecourse Thurles Retail Park Stradavoher	Planning Ref: 04/51/1551 - 14,190sqm retail space • Two retail warehouse units, each 875sqm • Main Stakelums Hardware building, 3,762sqm. • Offices and Hire facility, 1,100sqm. • Builders Store and the Cement and Plaster Store occupying a combined area of 2,717sqm. Planning Ref: 06/54/0007 Units 2 & 3 Retail Warehousing, 2,710sqm Planning Ref: 07/54/0007 Unit 7 Retail Warehousing, 862sqm of the building Planning Ref: 07/54/0005 Unit 5 Retail Warehousing, 1,620sqm	• Built • Built • Built • Built • Built • Built • Built
Roscrea	Parkmore Benamore	Planning Ref: 05/51/0779 – Retail Warehousing, 410sq.m 04/51/0834 – Retail Warehousing, 752sq.m 51/22979 – Retail Warehousing, 777sq.m Planning Ref: 51/24803 – 1 No. Retail warehousing, 400sq.m 04/51/1895 – 1 No. Retail warehousing unit, 1360sq.m 06/51/0123 – 3 No. Retail Units, 2,642sq.m 07/51/0027 – 9 No. Retail warehousing units 3,180sq.m 07/51/0299 – 3 No. Commercial & Ind. units, 1,974sq.m 07/51/1178 – 3 No. Retail warehousing, 2,212sq.m 07/51/1656 – 7 No. Retail warehousing units, 4,440sq.m 08/51/0460 – 2 No. Retail warehousing units, 2,241sq.m	• Built • Built • Built • Built • Built • Built • Not Built • Not Built • Not Built • Not Built • Not Built
Templemore	N/A		

3.4 Primary Shopping Areas

It is stated in the RPGs that the Development Plan shall define the boundaries of the core shopping area of town centres. Furthermore, it is stated that '*as far as possible new development is to be sited within town centres or, if no sites are available immediately on the edge of town centres*'.

The Core Shopping Area (CRA) as per RPGs is therefore defined as;
'That part of the retail area of a town centre where pedestrian flows are greatest, competition for representation is greatest and rents are noticeably higher than elsewhere, also known as the 'Prime Pitch''.

The Primary Retail Area (PRA) is the central retail area of a settlement centre and is usually located in the historic and social core of a town. Typical uses located in the PRA include high-end and niche comparison shopping. The PRA incorporates the Prime Pitch/Core Retail area and is immediately adjoined by the secondary retailing areas of the town centre.

A high concentration of high-end comparison retailers where shoppers are offered variety and a niche-shopping experience is indicative of a vibrant PRA. Most non-retail uses are more appropriately located off the PRA itself and on the adjoining streets in the town centre area. It is the policy of each Development Plan and Local Area Plan to restrict non-retail uses from locating at ground floor level in the PRA as non-commercial uses do not generally contribute to the vitality and vibrancy of the PRA. Non-retail uses are encouraged to locate in the town centre outside of the PRA.

The existing PRAs for each settlement have been assessed and amended based on the survey work done during the review of the Retail Strategy 2003. New PRAs have been identified which represent a more up-to date reflection of the current prime retail areas having regard to the level of development which has taken place since the preparation of the last Retail Strategy.

The Primary Retail Areas for each of the Tier 1, main centres in the County are illustrated in Figures 3.1 to 3.4.

- **Nenagh:** Pearse Street to Kickham Street, Mitchell Street, top part of Silver Street and three quarters of the way along Kenyon Street
- **Thurles:** Liberty Square, West Gate and Friar Street.
- **Templemore:** Main Street/The Square
- **Roscrea:** Main Street and Castle Street, including the Roscrea Shopping Centre

The Primary Retail Areas for each of the Tier 2 and 3, Secondary Service Centres and District Service Centres in the County are illustrated in Figures 3.5 to 3.9.

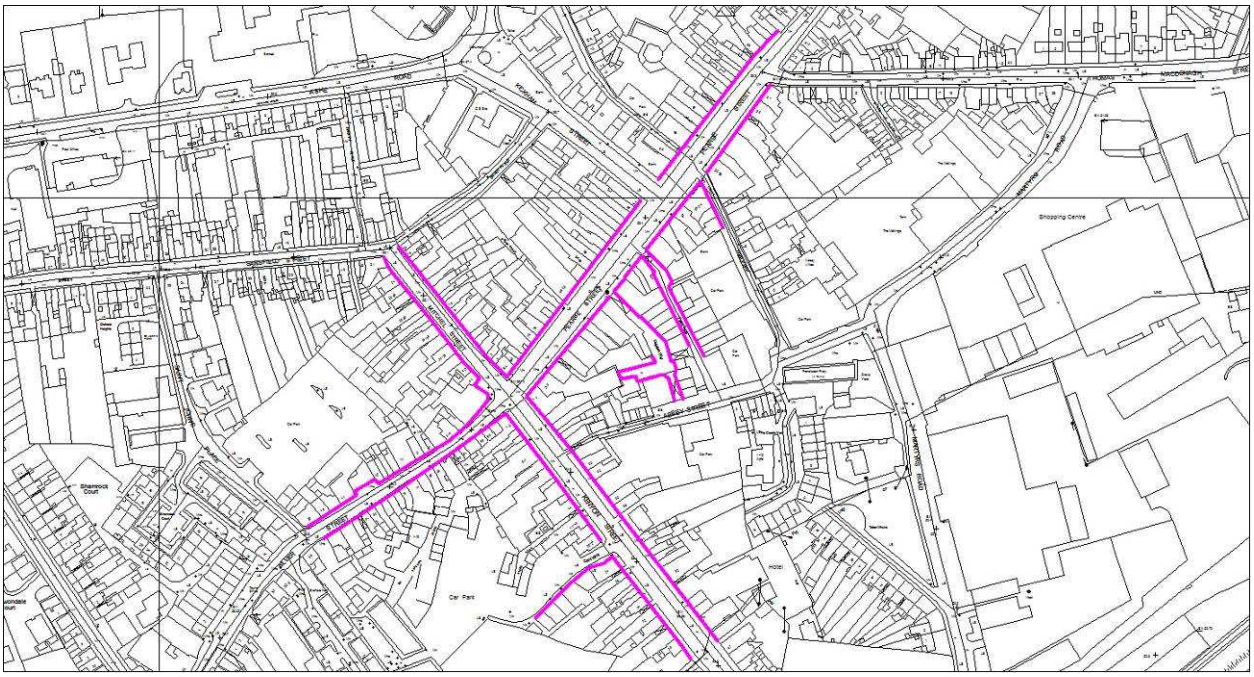


Figure 3.1: Nenagh's Primary Retail Area

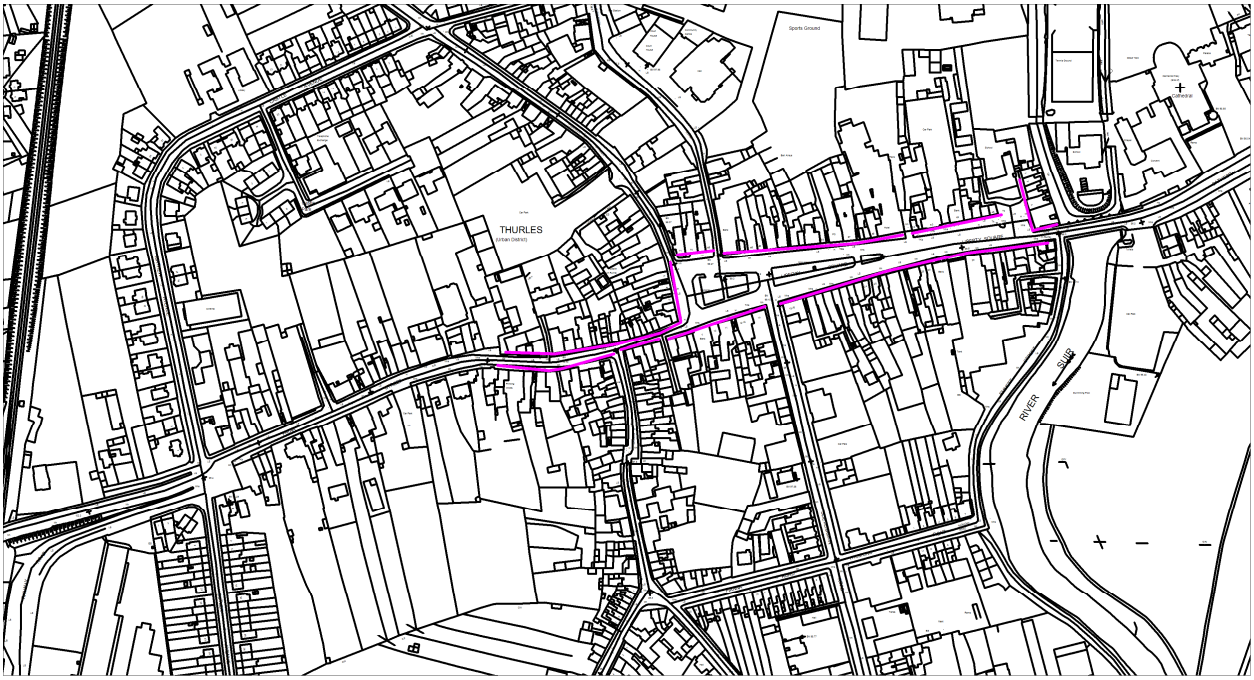


Figure 3.2: Thurles' Primary Retail Area

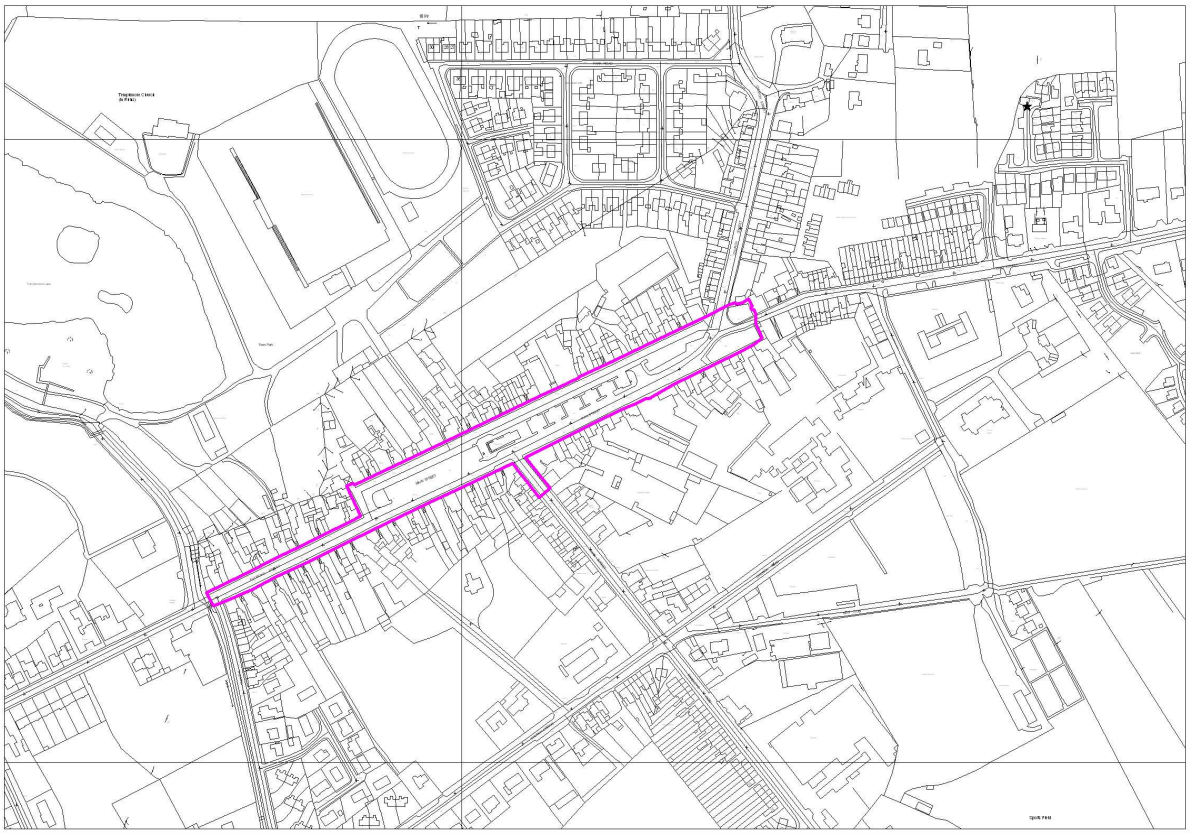


Figure 3.3: Templemore's Primary Retail Area

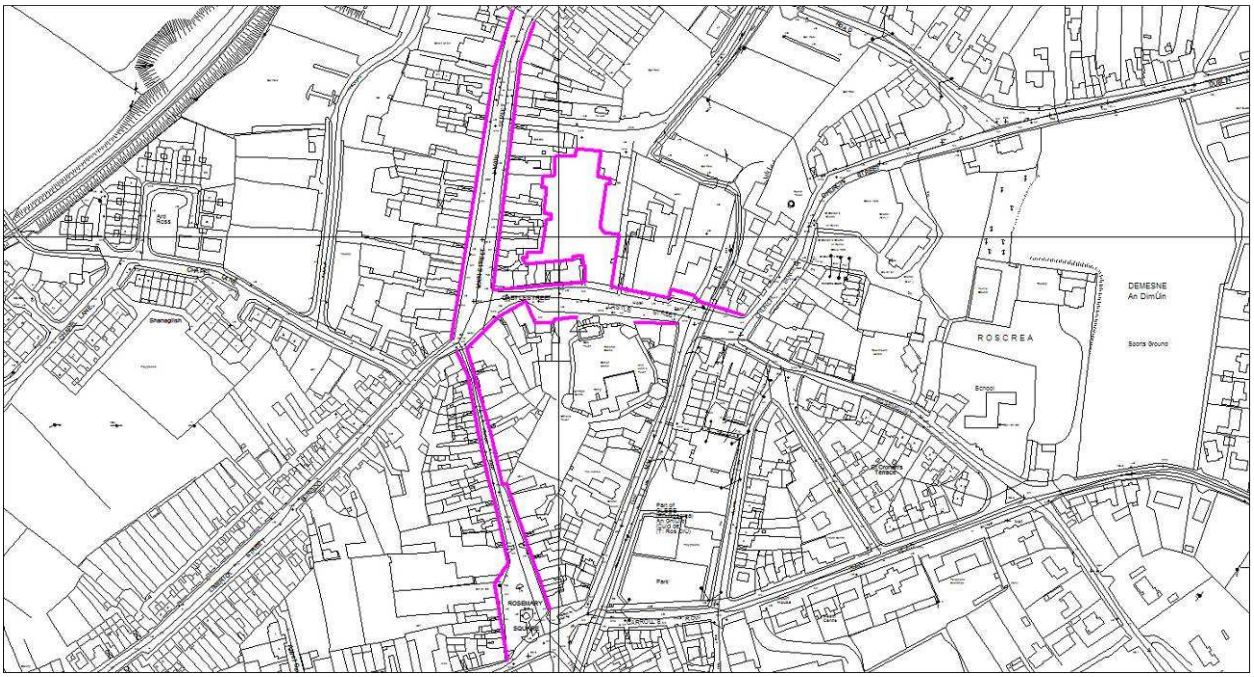


Figure 3.4: Roscrea's Primary Retail Area

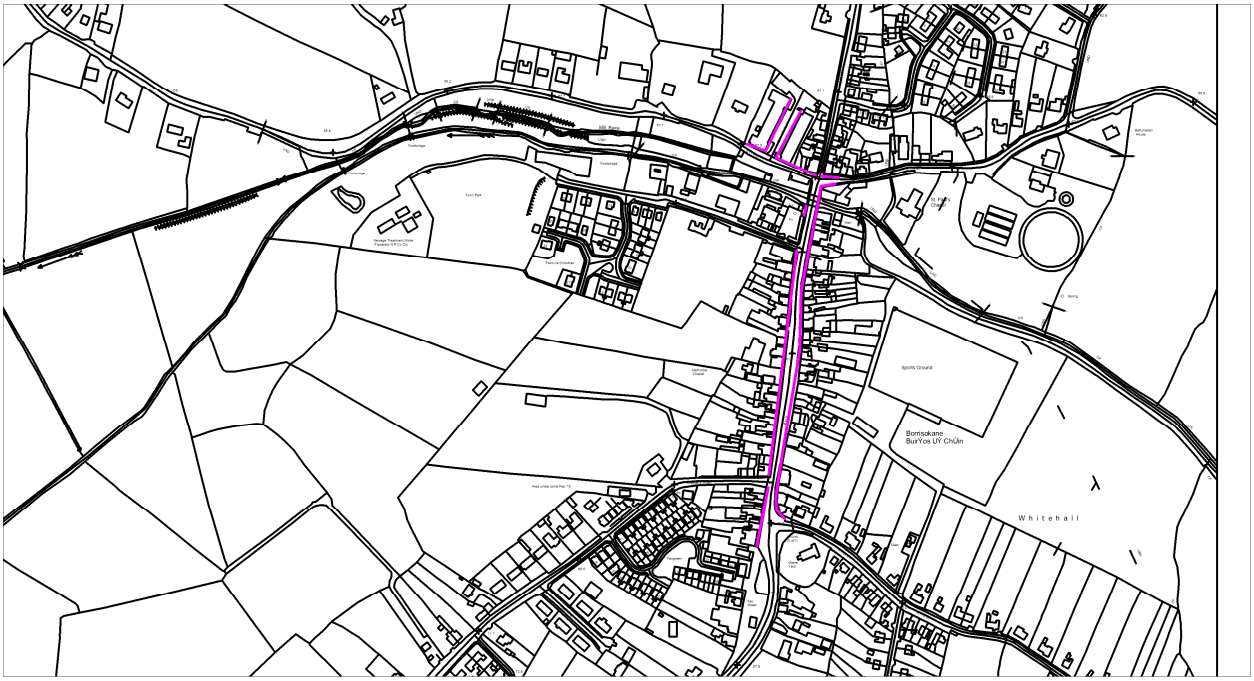


Figure 3.5: Borrisokane's Primary Retail Area

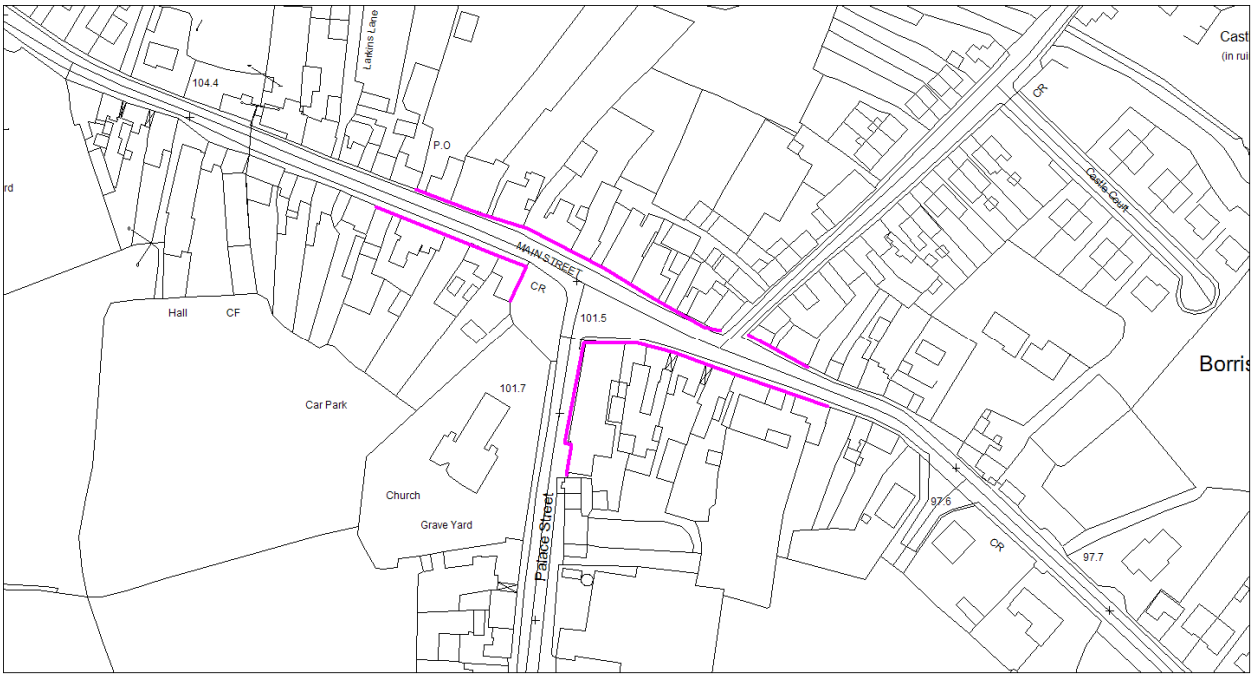


Figure 3.6: Borrisoleigh's Primary Retail Area

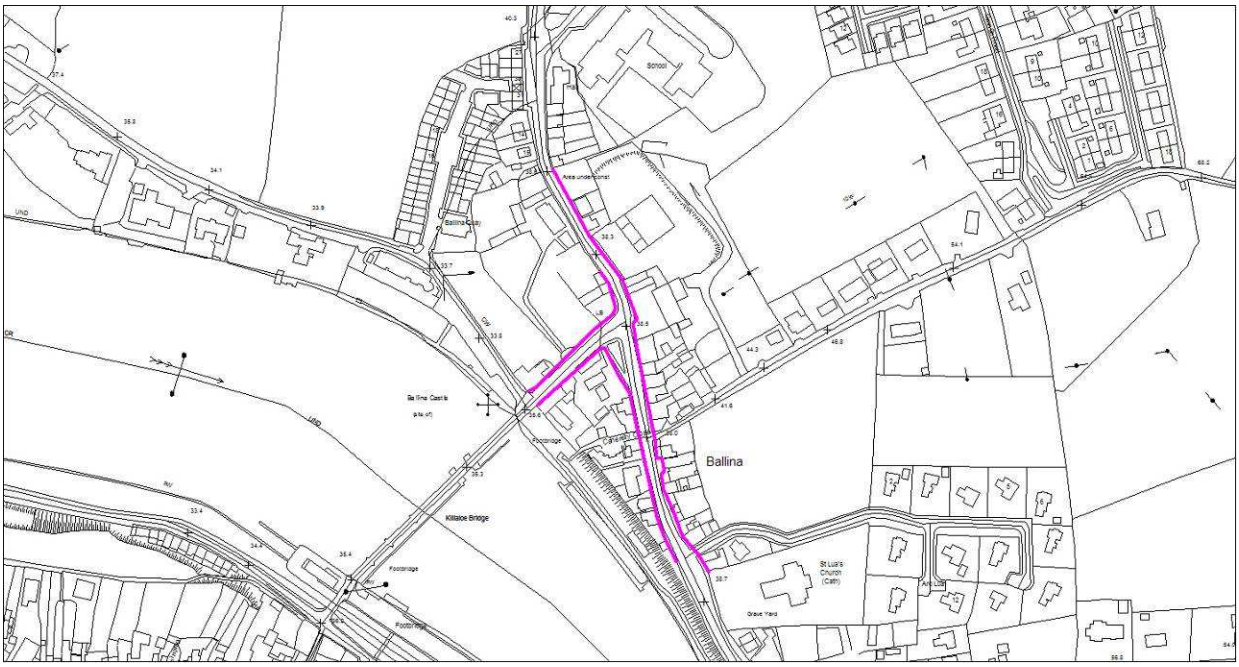


Figure 3.7: Ballina's Primary Retail Area

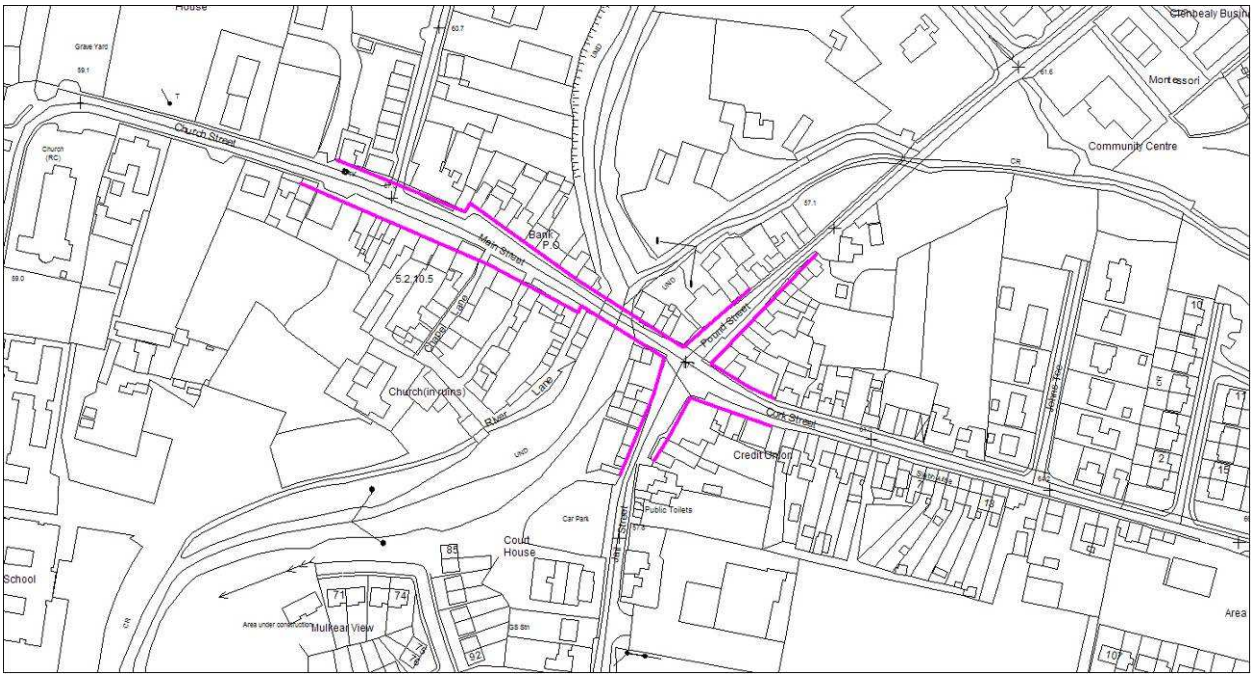


Figure 3.8: Newport's Primary Retail Area

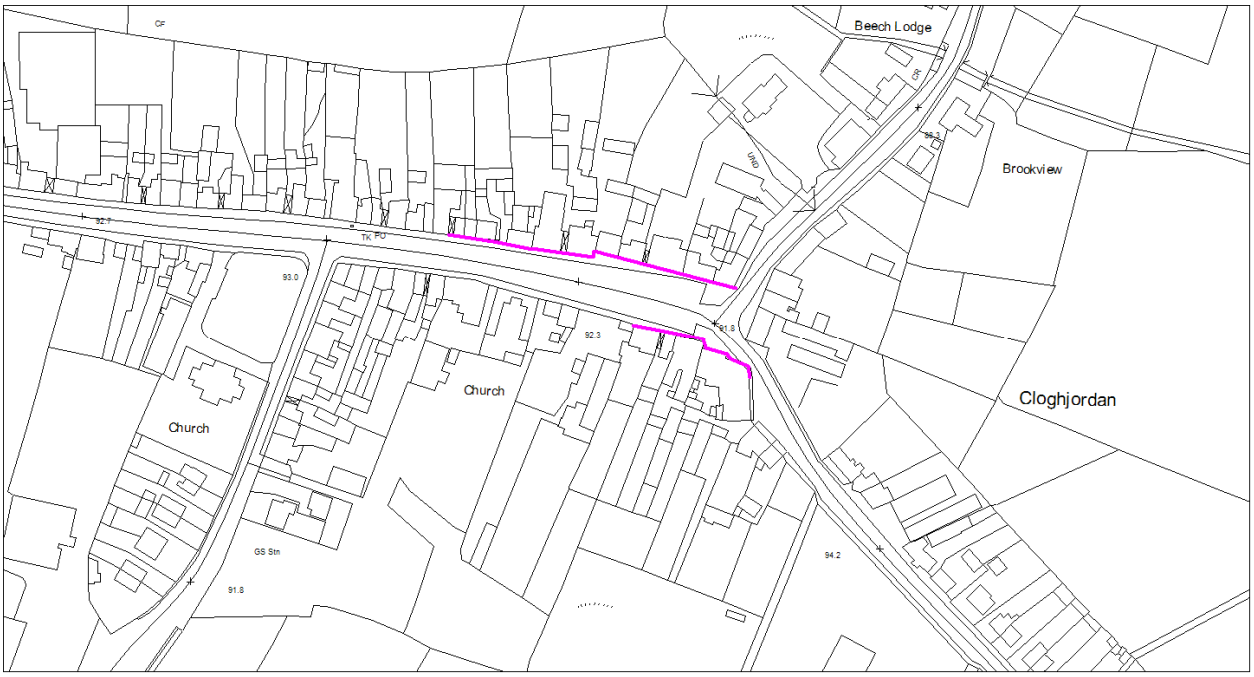


Figure 3.9: Cloughjordan's Primary Retail Area

3.5 Retail Health Checks and Vacancy

The retail floorspace figures outlined in Chapter Two are inclusive of existing vacant retail units. The detailed floorspace survey of the county's main centres undertaken in Mar-09 as part of the Mid-West Retail Strategy indicated that approximately 24,564sq m (19.2%) of the County's floorspace was vacant at that point in time.

For the purpose of this County Retail Strategy an overall percentage floorspace vacancy across all sectors and categories of retailing was not acquired. Due to the very significant increase in retail floorspace in certain sectors i.e. retail warehousing, the calculation of a total percentage vacancy rate would have been difficult and potentially misleading. Rather it was considered more accurate and practical to focus on the health of the key retail categories and locations in the County, in addition, this would provide a baseline against which future studies of vacancy in these areas could be assessed. Therefore, health checks were carried out in March and April 2011 to assess vacancy rates in the Town Centre Primary Retail Areas of the main towns. Subject to staff resources, more detailed health checks should be carried out in the following areas:

(a) Retail Warehouse Parks
(b) Shopping Centres

An assessment of the status and operational vitality of shopping centres, retail warehouse parks and the newly identified PRAs gives an indication of the vibrancy of retailing in the county, the demand for certain types of retailing, the need for additional floor space and most importantly, the vibrancy and vitality of the town centres of each county town. Each distinct retail format was assessed.

Nenagh PRA

Representation	Total (No.)	Vacant (No.)	Occupied (%)
Convenience	9	1	89
Comparison	102	14	86
Service/Office	24	2	92
Food/Drink/Hospitality	24	1	96
Residential	13	1	92
Other	2	0	100
Total	**157**	**17**	**89%**

Thurles PRA

Representation	Total (No.)	Vacant (No.)	Occupied (%)
Convenience	14	6	57
Comparison	49	6	88
Service/Office	21	2	90
Food/Drink/Hospitality	16	0	100
Residential	8	0	100
Other	1	0	100
Total	**109**	**14**	**87%**

Templemore PRA

Representation	Total (No.)	Vacant (No.)	Occupied (%)
Convenience	23	11	52
Comparison	27	0	100
Service/Office	20	1	95
Food/Drink/Hospitality	20	1	95
Residential	50	4	92
Other	5	0	100
Total	**145**	**17**	**88%**

Roscrea PRA

Representation	Total (No.)	Vacant (No.)	Occupied (%)
Convenience	6	1	83
Comparison	59	8	86
Service/Office	24	3	88
Food/Drink/Hospitality	20	1	95
Residential	18	3	83
Other	2	0	100
Total	**129**	**16**	**88%**

Ballina PRA

Representation	Total (No.)	Vacant (No.)	Occupied (%)
Convenience	1	0	100
Comparison	18	3	83
Service/Office	3	0	100
Food/Drink/Hospitality	7	0	100
Residential	12	3	75
Other	3	2	33
Total	**44**	**8**	**82%**

Newport PRA

Representation	Total (No.)	Vacant (No.)	Occupied (%)
Convenience	5	2	60
Comparison	10	1	90
Service/Office	10	1	90
Food/Drink/Hospitality	7	0	100
Residential	22	2	91
Other	0	0	0
Total	**54**	**6**	**89%**

Borrisokane - Main Street

Representation	Total (No.)	Vacant (No.)	Occupied (%)
Convenience	10	4	60
Comparison	16	4	75
Service/Office	8	0	100
Food/Drink/Hospitality	14	2	86
Residential	31	0	100
Other	1	0	100
Total	**80**	**10**	**88%**

Borrisoleigh - Main Street

Representation	Total (No.)	Vacant (No.)	Occupied (%)
Convenience	8	6	25
Comparison	5	0	100
Service/Office	2	1	50
Food/Drink/Hospitality	5	0	100
Residential	14	0	100
Other	1	0	100
Total	**35**	**7**	**80%**

Cloughjordan - Main Street

Representation	Total (No.)	Vacant (No.)	Occupied (%)
Convenience	3	1	67
Comparison	4	2	50
Service/Office	0	0	0
Food/Drink/Hospitality	2	0	100
Residential	8	1	88
Other	0	0	0
Total	**17**	**4**	**76%**

3.5.1 Town Centres/Primary Retail Areas

It is stated in the RPGs that '*in order for town centres to achieve their full potential and continually improve as retail destinations it will be appropriate and necessary to adopt a proactive role in enhancing the vitality and viability of their centres'*. It is a key objective of this County Retail Strategy to identify a pro-active approach towards the enhancement of town centres. In order to do this it is necessary to identify the 'health' of town centres in achieving their functions as core retail areas.

The PRAs of the four main county towns were inspected and assessed in October 2009, November 2010 and again in March and April of 2011. The health check comprised of a count of numbers of units at ground floor level, the vacancy rate of these units and the diversity of uses at ground floor level. A high concentration of retail/hostelry/restaurants units at ground floor level is considered an indicator of town centre vitality and a low vacancy rate is an indicator of a commercially strong town centre. Use types were classified as follows:

1. High Retail Value:
   Retail, Pubs, Restaurants, shops.

2. Medium Retail Value: Service
   i.e. Health and Beauty, Educational.

3. Low Retail Value: Residential/Office
   i.e. Auctioneer, Turf Accountant.

There are no national statistics available for average vacancy rates in town centres or what may be considered to be acceptable or unacceptable vacancy rates. The actual floorspace size of vacant units is an important consideration in an acceptable rate of vacancy in a town centre, i.e. a low vacancy rate may have an unacceptable impact on town centre vitality if a small number of vacant units are of a large floor size. In Table 3.5 a comparison is made of vacancy across the four local authorities in the Mid West Region and consideration is also given of the size of vacant units.

Table 3.5 Vacant Retail Floorspace in the Mid West Region by Council Area

Council Area	2002		2009	
	Sq.m Net	Col %	Sq.m Net	Col %
Limerick City	6,807	43	33,650	39
Limerick County	4,832	30	15,450	18
North Tipperary	1,437	9	24,564	29
Clare County	2,795	18	12,071	14
Mid-West Total	15,872	100	85,735	100

Source: *DTZ Sherry FitzGerald Floorspace Survey, June 2001 and Councils/Colliers CRE floorspace figures and estimates, 2009.*

3.5.2 Shopping Centres

The indigenous O'Connors Shopping Centre in Nenagh is the oldest centre and has been trading for many a decade. Tesco and Dunnes Stores are also trading successfully in Nenagh.

The Thurles Town Shopping Centre (anchored by Dunnes Stores) appears to be trading successfully with most of the retail units occupied.

The Tesco Shopping Centre in Roscrea started construction after being granted permission June 2009. This will increase the profile of and attractiveness of Roscrea as one of the main retail destination of the county. There is no dedicated shopping centre in Templemore at present, however; recent interest from branded multiples in the town is encouraging as such stores would broaden the existing choice of convenience retailing in the town.

Table 3.6 Current occupancy status of existing shopping centres

Town	Shopping centre	Comment	Total Floor Area	Total Vacant Floor Area
			March-11	March-11
Nenagh	O'Connors Shopping Centre	Location approximately 200 metres from the edge of the primary retail area. O'Connors Store with several independent retail units and	3,874sq.m	-
Thurles	Thurles Shopping Centre	The Shopping Centre is anchored by Dunnes Stores with several independent retail units. Location - approximately 400 metres from the edge of the primary retail area.	4,799sq.m	

Roscrea	Tesco	Shopping Centre. Location abutting the primary retail area.	4,869sq.m	30sqm (approx)
Templemore	N/A			

3.5.3 Retail Warehouse Parks

The County Retail Strategy 2003 identified that compared to other counties North Tipperary was poorly provided in terms of retail warehousing. In the interim period the demand for retail warehouse units has increased steeply in response to the strong economic climate and increased spending power of consumers. As a result, the construction of retail warehouse space increased with dedicated retail warehouse parks provided since the last County Retail Strategy 2003 in Nenagh, Thurles and Roscrea. There is no dedicated retail warehouse park in Templemore Town; however, retail warehousing units are located on individual sites throughout the town and county. An assessment of the occupancy of dedicated retail warehouse parks located in each town is a good indicator of current demand for new retail warehouse floor space.

Table 3.7 Current occupancy status of existing retail centres/parks

Town	Retail	Comment	**Total Floor Area March-11**	**Total Vacant Built Floor Area March-11**
Nenagh	Springfort	7 no. retail warehouse units 1 Convenience store	10,117sq.m retail warehouse	1,445 sq.m Food store 2 retail warehouse units at circa 700sqm each 1 retail warehouse unit at 2435sqm
Thurles	Racecourse Thurles Retail Park Stradavoher	4 retail warehouse units. 10 retail warehouse/ business units	14,190sqm c.15, 000sq.m	1 Unit at 890 sq.m 3 units at c.1,500 1 unit at 500
Roscrea	Parkmore Benamore	2 retail units 4 Units Built	1,939sqm 3571sq.m	0 sq.m 2 units at 536sqm
Templemore	N/A			

Nenagh
Nenagh has one dedicated retail warehouse park known as the Springfort Park; this currently comprises seven retail units and 18 warehouse/light industrial units. The extent of this vacant floorspace indicates that there is little current demand for additional retail warehouse floor space in the town a recent planning application for an expansion to one of the retail units to create an additional convenience store was refused planning permission by An Bord Pleanála.

Further development of single retail warehouse units should be in line with the RPGs which recommend that retail warehouse units be clustered in a single retail warehouse park.

Nenagh is the main county town. Further development of retail warehousing in Nenagh must demonstrate that the cumulative impact of new retail development would not impact negatively on the vitality and vibrancy of the town centre.

Thurles
There are two main retail warehouse parks in the town, with the most recent being constructed at a prominent location on the Nenagh Road. This development is currently fully occupied with the exception of one unit. There are further units granted at the Co-op on the Templemore Road and at the former Hibernian Meats Site on the Dublin Road. There would appear to be little need for additional retail warehouse floorspace in the town.

Roscrea
The Dublin Road, Roscrea has seen significant retail development recently, as represented by the new Benamore Retail Warehouse Park. In view of the current vacancy rates in the new retail warehouse park, there appears to be little demand for further retail warehouse development in Roscrea at present.

Templemore
There is no dedicated retail warehouse park located in Templemore. It is also noticeable that a trend has developed towards single retail warehouse units. Future development of single retail warehouse units should be in line with the RPGs which recommend that retail warehouse units be clustered in a single retail warehouse park. The identification of suitable lands for such development should form part of the review of the Templemore and Environs Development Plan.

3.6 Summary of location of existing Retail Developments
The appropriate interaction and the performance of the main retail facilities i.e. the PRA of each town, out-of-town shopping centres and retail warehouse developments is critical for the future of retail development in North Tipperary.

The following key locational trends can be identified:

- In recent years there has been a trend towards the location of large convenience stores away from town centre areas and to edge-of-centre and out-of-centre sites. This trend is pronounced in Nenagh, where out of nine convenience stores, only one (O'Connor's) is located in the PRA. The location of large convenience stores in the PRA is vital to providing a complete shopping experience in the central area and attracting shoppers, therefore, the retention of large format convenience stores in the PRA or the location of large format convenience stores on edge-of-centre sites where they have excellent linkages with the PRA is a key requirement for town centre vibrancy.
- New shopping centres/streets have been developed in Nenagh and Thurles. This trend has increased the retail profile of each town by providing a modern format retail facility in line with modern demands and expectations. However, potential cumulative impact on town centre vitality due to trade draw towards out-of-centre locations must be a key consideration in assessing any further proposals for out-of-centre retail development proposals.

3.7 Summary of Retailing in Main Centres

Based on the assessment set out above regarding the nature of retail provision in the main centres of the county the following key factors can be identified;

3.7.1 Nenagh

Nenagh is very well represented among national and multinational large format convenience stores. The following stores are located in the town; Tesco, Dunnes Stores, Centra and Lidl.

Vacancy rate in the PRA of Nenagh is increasing. Existing vacant units in the Nenagh PRA are important retail sites due to their large floorspace, and this increases the significance of existing vacancy. In addition, there are sizable disused/underused sites located on edge-of-centre sites. Despite the high profile of Nenagh as a convenience shopping destination, the comparison offer of the town centre is limited. National and multinational brand names are underrepresented. Nenagh has potential to enhance the profile of its town centre comparison offer with town centre and edge-of-centre vacant units available to new retail development at present. This illustrates a need to direct new retail proposals to existing vacant or brownfield town centre sites or to edge-of-centre sites with excellent linkages with the PRA. The amalgamation of existing sites will contribute to the delivery of larger unit sizes in the PRA; this approach would enhance the attraction of national and multinational brand names to the PRA.

In recent years there has been a noticeable trend towards the development of retailing on locations removed from the town centre. Out of the convenience stores listed above, only one is located in the town centre area, (the second convenience store as mentioned earlier is indigenous, O'Connor's). This highlights a need to consider the impact of trade draw on town centre vitality as part of the assessment of any further retail developments on sites removed from the town centre area.

Nenagh has one dedicated retail warehouse park, located at the Stereame/Springfort. However, it should be noted that Springfort has a number of vacant units. It is vital that this dedicated retail warehouse park is retained and occupied to fulfil retail warehousing floorspace requirements for the town. Any proposal for further retail warehousing development in Nenagh will be assessed against the criteria for the assessment of retail proposals outlined in the policies and objectives of the Nenagh and Environs Development Plan.

3.7.2 Thurles

When compared with Nenagh and Templemore towns, Thurles has a medium level of vacancy in the PRA. It was found that retailing in the town centre generally lacks vibrancy. A renewed focus on the development of new retail floorspace on vacant town centre units must occur to prevent expenditure leakage from the catchment to Limerick, Clonmel and Kilkenny and further afield to Dublin and Cork. New development in the town centre has historically been inhibited by physical constraints. However, the Local Authorities note that there is a strong relationship between the PRA and Thurles Shopping Centre. Amalgamation of town centre units should be actively facilitated and backland development encouraged.

Liberty Square, Cathedral Street and Friar Street contain the main historic properties, which are the focal point for the development of the commercial product in Thurles. It is important, therefore, that the environment surrounding

these sites is preserved and enhanced. A number of the registered derelict sites have been developed or are in the process of being developed.

Thurles has the next largest urban population in the County after Nenagh Town. When compared with Nenagh and Roscrea, Thurles is on par with national and multinational convenience stores. The geographical proximity of Thurles to both Clonmel and Kilkenny City, together with its excellent rail connectivity to Dublin and Cork, attracts retail trade away from the town. In order to address expenditure leakage especially due to the limited offer of convenience shopping choice there is potential for the development of another convenience store in the town. This highlights the need to actively accommodate new retailers in central area or edge-of-centre sites in line with the objectives of the Thurles Town Development Plan.

Thurles has two dedicated retail warehouse park located at Thurles Retail Park, Stradavoher and Racecourse Retail Park. These developments are not currently fully occupied and illustrates that the demand for additional retail warehouse floorspace in the town is limited. However, in order to ensure that Thurles retains its place as a key shopping destination for the south-east of the county, it is vital that these dedicated retail warehouse parks are retained and occupied to fulfil retail warehousing floorspace requirements for the town.

3.7.3 Templemore

Despite a marginal increase in population in Templemore, there has been little new retail provision since the County Retail Strategy 2003. However, Lidl now occupies a town centre site, which is well located to benefit the town centre due to their proximity and connectivity and would ensure that expenditure leakage from the town centre is reduced.

Templemore's vacancy rate provides ample availability for new retail floorspace and especially comparison retailing in the town centre area. A renewed focus on vacant town centre units must occur to prevent expenditure leakage from the catchment of Templemore. The provision of retail space at out-of-town locations should be resisted and edge-of-town locations carefully evaluated in order to minimize their potential impact on the town centre.

3.7.4 Roscrea

Roscrea is the third largest settlement in the county; however, since the County Retail Strategy 2003 a significant amount of retail floorspace has been developed in the town. Due to the location of Dunnes Stores, Supervalu, Lidl, and Tesco (and the development of a new Tesco store) the convenience needs of the population are largely addressed within the town. Additional comparison retailing floorspace has been developed in the town since 2003. It is considered that Roscrea is now retaining much of its convenience expenditure.

The town centre appears relatively vibrant and has retained many long-established independent traders; however, there remains availability for new retail development on town centre sites. The retention of this town centre vibrancy must be a key consideration in the future, with linkages between the town centre and any new developments being a priority. It is also important that the heritage value of the town centre is retained while facilitating new developments.

Roscrea has two dedicated retail warehouse park located at the Benamore and Parkmore. The Benamore development is poorly occupied and illustrates poor demand for retail warehouse floorspace in the town at present. However, the retention of this dedicated retail warehouse floorspace is vital to ensuring that Roscrea can retain its place as a retail destination.

The PRA in Roscrea has a varied range of low to high end retail units and a low vacancy rate. Despite the number of office and retail units in the PRA, the town centre appears vibrant and well maintained. In order for Roscrea to benefit from visitor numbers to the town, there must be a focus on the further development of high end retailing in the town centre.

4.0 NORTH TIPPERARY COUNTY RETAIL HIERARCHY

4.1 Introduction

The Retail Strategy's primary purpose is to support the statutory plan making process to ensure that adequate provision is made for new retail development in the most appropriate locations and that the vitality and viability of existing centres are protected. The strategy provides guidance on the need for new retail floor space and where, in accordance with the principles of sustainable planning, it should be allocated. This section sets out the key policy areas of the new Retail Strategy for North Tipperary. This Section looks at each of the main towns across the County. The implications of the retail market review coupled with the quantitative retail floorspace need assessment for the County provide an important basis for the policy direction of the new Retail Strategy, as well as for the determination of planning applications. This section is divided into five sub-sections:-

- The retail hierarchy
- The retail strategy Strategic Objective.
- Policy guidance for each centre.
- Proposals for continued monitoring.
- The development management process.

The determination of the County Retail Hierarchy is a key component of the County Retail Strategy and for the future development of retailing in the County. In order to set out a retail hierarchy for North Tipperary, national, regional and local level guidelines must be examined. The Regional Planning Guidelines for the Mid-West Region sets out a regional settlement strategy and the Retail Planning Guidelines sets out a retail hierarchy for the country. These documents form the background for the preparation of the Settlement Strategy in the County Development Plan 2010 and consequently the Retail Hierarchy for North Tipperary.

4.2 National Retail Hierarchy

The Retail Planning Guidelines sets out a Retail Hierarchy for the Country; settlements are separated into Tiers which reflect their place in the National Retail Hierarchy (see Table 4.1). The only **Tier 1** centre in the national hierarchy is Dublin which provides the broadest range of comparison goods shopping and supplies retail functions of a specialist nature not found elsewhere in the State.

The other main cities in the country – Cork, Galway, Limerick and Waterford – represent **Tier 2** centres in the national retail hierarchy. Along with Dublin, these centres provide a range of high order comparison shopping which is largely unmatched elsewhere.

Tier 3 centres are sub-divided into two categories and the centres that sit in both levels of this third tier are identified. There is no centre in North Tipperary identified as a **Tier 3 Level 1** Centre. The only centre in the Region with this designation is Ennis.

The guidelines recognise that there is another group of centres that may also be regarded as third tier centres in the national hierarchy, albeit to a more limited extent. These are the **Tier 3 Level 2** Centres. These centres do not have the scale or diversity of retail floorspace as Ennis; however they do act as urban anchors for a rural economy. The RPGs state that Nenagh and Thurles are examples of towns that have the attributes of Tier 3 Level 2 centres.

The **Fourth Tier** in the hierarchy comprises a large number of small towns in the 1,500 to 5,000 population category. In North Tipperary this category is represented by Templemore and Roscrea. Roscrea's retail offer now closely resembles that of a Tier 3 Level 2 centre however, due to its current population which is less than 5,000 it remains a Tier 4 centre.

Beyond these tiers, shopping at the most local level is provided by village stores and post-offices etc. In North Tipperary, Borrisokane, Borrisoleigh and Newport are the largest **Fifth Level Tier** centre.

Table 4.1 Retail Planning Guidelines Retail Hierarchy

Tier	Location	Comment
Tier 1	Dublin. This Tier is not Applicable to North Tipperary.	Convenience, broadest range of comparison and specialist shops not found elsewhere in State.
Tier 2	Cork, Galway, Limerick and Waterford. This Tier is not Applicable to North Tipperary.	Convenience and high order comparison largely unmatched elsewhere.
Tier 3 Level 1	Ennis and Tralee. This Tier is not Applicable to North Tipperary.	Convenience, comparison and now attaining functions previously only found in higher order centres.
Tier 3 Level 2	Nenagh and Thurles.	Third tier towns to a more limited extent contain convenience goods outlets on a par with the core third tier towns. Most have national supermarket chain representation. Important in less densely populated areas of the State.
Tier 4	Templemore and Roscrea.	Basic convenience shopping in small supermarkets or convenience shops. In some cases lower order comparison shopping such as hardware.
Tier 5 Level 1	District Service Centres. Borrisokane, Borrisoleigh and Newport are the most significant Tier 5 Level 1 settlement.	Rural shop, local services and post office, these are important in supporting social and economic life.
Tier 5 Level 2	Local Service Centres	Rural Shop which will give self-sufficiency to rural settlements and reduce the need for travel.
Tier 5 Level 3	Settlement Nodes	Rural Shop which will give self-sufficiency to rural settlements and reduce the need for travel.

4.3 The Role of Centres in the County

The RPGs set out guidance on the nature and scale of retail development appropriate to each settlement tier in the national retail hierarchy. Table 4.1 sets out details of the nature and scale of retail development appropriate to the settlements in North Tipperary based on their place in the national retail hierarchy.

In view of the increase in retail floorspace in Nenagh and Thurles since the preparation of the County Retail Strategy 2003, these towns have retained their place as a Tier l centres in the County Retail Hierarchy.

The population of Roscrea has increased to just less than 5,000 and its national and multinational convenience store representation has improved significantly. In view of this in the opinion of this Council, Roscrea's place in the National Retail Hierarchy is now similar to that of a Tier 3 Level 2 centre.

The population of Templemore has marginally increased; interest has been expressed from large national and multi-national retailers, therefore, not withstanding a lower retail growth rate then Roscrea Town. It should also be noted that the County Settlement Hierarchy as set out in the County Development Plan 2010 identifies these towns as being Primary Service Centres.

4.4 County Retail Strategy Strategic Objective

The planning system has a key role in facilitating and promoting sustainable patterns of development, including the creation of vital and viable city and town centres, which serve the surrounding developed areas and rural communities in the hinterland in a meaningful and practical way.

The central key objective of the Retail Strategy is to support the "town centre" first approach in the context of the retail hierarchy, and to promote the vitality and viability of existing centres by focusing development in them and encouraging a wide range of services in a good environment which is accessible to all.

The quantitative assessment of retail floorspace need underpinning the Retail Strategy 2003 identified significant potential for the development of additional retail floorspace. The Review of retail need has demonstrated that this potential was over estimated for a number of reasons. Since 2003, there has been a very significant growth in retail floor space, not only within North Tipperary, but also within the Mid West Region, a level of growth which has even outstripped the level of need identified in the Retail Strategy 2003. Whilst there has been substantial relative growth across North Tipperary, the bulk of new floorspace within the Region was provided in the Limerick Metropolitan Area, with very little being provided within Limerick City Centre. North Tipperary has had to complete against leakage from the County to Limerick and other urban centres.

North Tipperary is now at a crossroads where, if further large scale suburban out-of-town retail development is allowed, either within the County or in neighboring counties, there will be possibly irreversible detrimental impacts to the towns within the County. All such proposed developments must prove they are in accordance with the sequential approach to retail development as prescribed by the RPG, must meet the criteria outlined in paragraph 65 of the RPGs and must demonstrate there will be no detrimental Retail Impact arising which would impact on the health and vitality of the town centre. What the developments over the last few years have shown is that new retail development in one location unsupported by a corresponding growth in expenditure will divert trade from existing retail centres elsewhere, with a consequent disinvestment and loss of jobs there.

As a consequence, it is necessary that a new approach be adopted; which seeks to coordinate the provision of new retail development across the County, while having regard to what is happening within the Region. This will create a balanced sustainable pattern of shopping in accordance with the broad objectives of the National Spatial Strategy, the Mid-West Regional Planning Guidelines and the County Development Plan, ensuring the viability and vitality of town centres within the County while at the same time contributing to sustainable national economic and employment growth and the promotion of social inclusion.

The new Retail Strategy therefore emphasises the importance of the main town centres both at the top of the retail hierarchy and as an important tourism product for the County. North Tipperary Town Centres have a historic interest, service infrastructure and transport accessibility to offer a cohesive attraction to both local people and visitors, and it is important that its attraction is not undermined by run down town centres which fail to provide a choice of high quality retail facilities suitable for towns of their size.

It is important for the main towns within North Tipperary to maintain retail function and to retain and improve their market share. The consequence of not having strong clear policies and guidance in-place would be to accept the

long term decline in the range and quality of retailing in North Tipperary's town centres.

Those centres in the suburban areas of the main towns which meet the day to day needs of a local catchment population through the provision of main food shopping outlets should be supported and reinvigorated where necessary. However, their role should not be allowed to expand to encompass a materially broader range of comparison goods as this could lead to further competition with the town centres. There should be no new permissions granted for additional out of centre retailing, including the extension of any existing store or retail park, and the broadening of the range of goods sold to encompass any categories other than bulky goods. Similarly these centres and retail parks should not be expanded beyond a scale appropriate for a suburban shopping location in North Tipperary. Consequently, there should not be any expansion of these shopping facilities in order to allow the town centre to foster investment and improve their trading position.

Therefore, notwithstanding the general lack of retail need identified up to 2016 and beyond, the proposed Retail Strategy does not seek to prohibit new development. Instead the Retail Strategy seeks to match the scale and function of retail development with the scale and function of the centre, combined with a restriction on new development in out of centre locations. The Retail Strategy 2003 devised the first hierarchy of centres for the County. The new hierarchy was developed following a detailed review of existing settlements and with reference to the national and local policy inputs applicable at the time. The hierarchy is intended to provide the means to:-

- recognise the role and importance of North Tipperary's Town Centres;
- to define the role of shopping centres in the County;
- enhance the County's competitiveness by clearly identifying the key centres in the hierarchy where major new retail floor space should go;
- strengthen the role and function of key centres around the County;
- ensure that there is a good geographical distribution of key centres in the hierarchy; and
- differentiate between centres within the different levels of the hierarchy

4.5 The Main Retail Centres

Each settlement centre has unique attributes that make it distinct from the other settlements in the County. These attributes are identified in the Development Plan or Local Area Plan where relevant for each town and ultimately may influence current and future trends for retail development and influence the retail catchments of each settlement.

Nenagh and Thurles. The County Town for North Tipperary is Nenagh. This is the main retail centre of the County and is a Tier 3 Level 2 centre in the national retail hierarchy outlined in the Retail Planning Guidelines 2005. Thurles is the second largest populated town and also is a Tier 3 Level 2 centre. Both serve a catchment that extends across the entire county and beyond. In accordance with comparable towns at this level in the RPG hierarchy, both have significant comparison floor space, including some higher order shopping and offer a wide range of non-retail services. Nenagh and Thurles will continue to act as the main convenience and comparison provider in the County.

However, it is anticipated that as the retail offer of the four main towns improve and mature then the dominance of the towns of Nenagh and Thurles in the convenience sector will reduce. This highlights a need to concentrate on the development of comparison floorspace and specifically higher order comparison floorspace in Nenagh and Thurles.

Templemore and Roscrea. Templemore and Roscrea have emerged as Tier 4 settlements in the National Retail Hierarchy. This reflects their population size, quantum and type of retail floorspace, geographical location and the extent of their catchment area. Both towns must increase their retail offer if they want to fully develop as Tier 3 Level 2 centres, thereby reducing trade draw towards Limerick, Clonmel or Kilkenny for the main convenience shopping needs of its catchment.

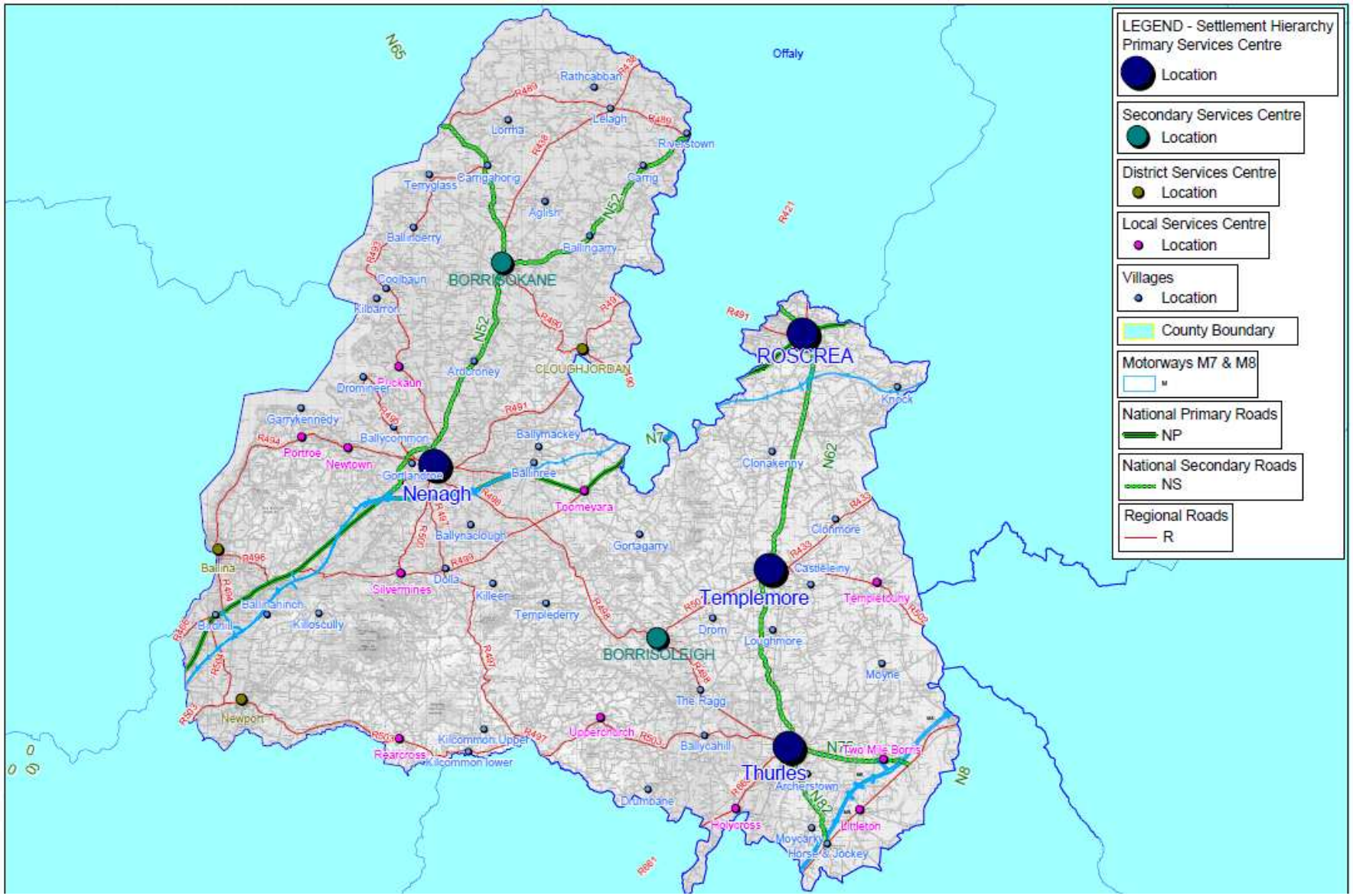
Based on its significant increase in convenience and comparison retail floorspace (Dunnes Stores and Tesco), Roscrea is demonstrating the attributes of a Tier 3 Level 2 settlement despite its smaller population base.

Roscrea attracts high visitor numbers to its historical cores, however, to further enhance the economic benefit of high visitor numbers, there needs to be a focus on small scale high-end comparison units, local and niche shopping and quality hostelries in the town centre.

Table 4.3 and Figure 4.1 represents data from the County Development Plan 2010-2016 (Table 3.7 and Figure 3.9) which sets out the Population Targets Breakdown for 2022 Based on Settlement, Retail and Economic Hierarchy (Source: Mid West Regional Planning Guidelines 2010 and County Development Plan 2010).

Table 4.3 Population Targets Breakdown for 2022
Based on Settlement, Retail and Economic Hierarchy

Hierarchy Position	Town	Population 2006	Population 2016	Population 2022
Tier 1 Primary Service Centres	Nenagh	7,751	8,957	9,590
	Thurles	7,682	8,791	9,372
	Roscrea	4,910	5,858	6,354
	Templemore	2,270	2,594	2,631
Tier 2 Secondary Service Centres / Market Towns	Borrisokane	832	994	1,079
	Borrisoleigh	626	711	756
Tier 3 District Service Centres	Ballina	1,861	2,150	2,301
	Newport	1,286	1,490	1,597
	Cloughjordan	394	469	508
Tier 4 Local Service Centres	Holycross	343	394	421
	Littleton	463	531	567
	Toomevara	286	336	362
	Twomileborris	550	635	680
	Puckaun, Silvermines, Portroe, Rearcross, Templetuohy, Newtown, Upperchurch			
Tier 5 Villages	Aglish, Ardcroney, Ballinahinch, Ballinderry, Ballingarry, Ballycahill, Ballycommon, Ballymackey, Ballynaclough, Birdhill, Carrig, Carrigahorig, Castleiney, Clonakenny, Clonmore, Coolbaun, Dolla, Drom, Drumbane, Dromineer, Garrykennedy, Gortagarry, Horse & Jockey, Kilbarron, Kilcommon, Kileen, Killoscully, Knock, Lelagh, Lorrha, Loughmore, Moycarkey, Moyne, Rathcabbin, Riverstown/Killeen, Templederry, Terryglass, The Ragg (Bouladuff).			
Tier 6 Rural Countryside				


LEGEND - Settlement Hierarchy
Primary Services Centre
Location
Secondary Services Centre
Location
District Services Centre
Location
Local Services Centre
Location
Villages
Location
County Boundary
Motorways M7 & M8
M
National Primary Roads
NP
National Secondary Roads
NS
Regional Roads
R
Offaly
BORRISOKANE
CLOUGHJORDAN
ROSCREA
Nenagh
Templemore
BORRISOLEIGH
Thurles
Rathcabban
Lorrha
Lelagh
Riverstown
Terryglass
Garrigahorig
Garrig
Aglish
Ballinderry
Ballingarry
Coolbaun
Kilbarron
Ardcroney
Drominee
Puckaun
Garrykennedy
Portroe
Newtown
Ballycommon
Gortlandroe
Ballymackey
Ballinree
Toomevara
Knock
Clonakenny
Clonmore
Castleiney
Templetouhy
Ballinaclough
Gortagarry
Ballina
Silvermines
Dolla
Killeen
Templederry
Ballinahinch
Killoscully
Drom
Loughmore
Moyne
The Ragg
Newport
Rearcross
Killcommon Upper
Killcommon lower
Upperchurch
Ballycahill
Two Mile Borris
Archerstown
Drumbane
Holycross
Littleton
Moycarky
Horse & Jockey
N65
N52
N7
N62
N8
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5.0 GUIDANCE ON LOCATION & SCALE OF NEW RETAIL DEVELOPMENT

5.1 Introduction

The previous sections of this report examined trends for retailing and set out the quantitative foundations for the County Retail Strategy. This section sets out the strategic policy approach of the Council regarding the development of retailing in the County and sets out the key planning considerations for new retail development as set out in the statutory Development Plans.

The Regional Planning Guidelines set the spatial context of future Development Plans and Local Area Plans in the Mid-West Region. These Guidelines are set within the overall policy framework established by the National Spatial Strategy first adopted in 2002 and updated in 2010 and the National Development Plan 2007-2013. They also reflect other national social, economic and environmental policies which affect the Mid-West Region, as well as a range of existing regional strategies such as the Regional Climate Change Strategy, the Regional Waste Management Strategies and the County and City Development Board Strategies. The Guidelines set clear objectives and targets which will guide the preparation and reviews of City and County Development Plans in the Mid-West Region.

Key objectives of the Guidelines include networking the National Gateways, development of transport corridors and the identification of the role of medium-sized towns and rural areas as drivers of sustainable development.

A number of Regional Strategies that are either in existence or in preparation are relevant to the development of the Retail Planning Guidelines. The development philosophies that underpin these strategies and plans may be summarised as follows:

- There is a hierarchy of settlements that can be identified, each of which can be expected to provide a different range and level of services. For example, the Regional Retail Strategy identifies five different Tiers of centre ranging from Limerick City Centre, which stands alone as Tier 1, to small cross-road and local shops which are identified as Tier 5;
- Development should be distributed in a way that assists in the enhancement of the existing settlement structure, but that also facilitates the continued development and enhancement of rural communities;
- The regional economy must respond to the needs and enterprise development potential of the more remote as well as the more centralised areas;
- The role of the Region in attracting major investment must be protected and enhanced;
- The principal access infrastructure must be protected and enhanced;
- The environmental resources of the Region must be protected and, where degraded, must be improved;
- Development should have regard to the needs of the more disadvantaged as well as those that are able to participate fully in society.

5.2 County Development Strategy

Although settlement hierarchies have different functions and are related to a wider range of considerations and factors than retailing alone, it is important that the Council's objectives as set out in each Development Plan have a direct relationship between the County Settlement and Retail Hierarchies. The preferred growth/settlement strategy as set out in the County Development Plan 2010-2016 is based on the creation of a hierarchy of growth nodes.

The delivery of the Retail Strategy Strategic Objective for North Tipperary is critical to achieving viable, sustainable and functional retail facilities for the main towns and the wider County and ensuring that the needs of the centres in each tier of the hierarchy are met in a balanced manner. This delivery is dependent upon establishing a coherent policy approach for the County, which is commercially realistic.

While the translation of the Strategic Objective into policy objectives for the County requires key directions to be laid down and a framework established, it is also important that the impact on the wider Region are explored and acknowledged. In the County Development Plan 2010, Policy ECON 19a Regional Shopping states that "*It is the policy of the Council to support the position of Limerick City as the key retail centre in the Mid West Region for co-operation across Council boundaries*". It is a necessary element of this Strategy that whatever Strategic Objective is implemented it does not negatively impact on Limerick City Centre. In planning for retail development in the County it is necessary to:-

- Take into account the implications of the national and local retail market: - the state of the national retail market will impact upon the need for new retail floorspace within the local area. Similarly the amount and quality of existing retail floorspace and whether it meets the requirements of retail operators is important;
- Be aware of new trends, technologies, efficiencies and innovations: - retailing is a dynamic industry and new trends impact on both the type, and through increasing internet trading, the amount, of retail floor space required;
- Take account of the broad forecast for additional retail floorspace need and how the retail sector will want to respond to that demand over the Plan period:- these assessments form the cornerstone for the development of retail policies allocating sites for development;
- Encourage retail development in "town centre" locations, restricting development out of centre: - town centres are hubs of social community and transport networks and key to achieving sustainable patterns of development. Their continued health can be undermined by excessive retail development out of centre. It is however also necessary to ensure that the scale of development proposed in a centre relates to the role and function of that centre;
- Use conditions to regulate the total amount of retail floorspace in out of centre developments and to restrict the range of goods which can be sold, to protect the vitality and viability of "town centres": - over time, out of centre developments can change character from one that is complementary to a town centre to one which is harmful;
- Recognise the role of retailing as a key contributor to a vital and viable town centre by encouraging the provision of shops in the "Primary Retail Area";
- Identify a range of suitable sites on which the demand for development might best be met, with particular emphasis on improved public transport links: - a Town Centre First policy will not be successful unless provision is made for meeting the identified demand in central locations. It is necessary therefore to both identify sites and a strategy for bringing those sites forward;
- Assess the impact of significant proposed expansions of retail floorspace on movement taking into account impact on road capacity and access to public transport: - retailing can attract significant volumes of traffic and it is important to ensure there is sufficient road capacity to cater for this traffic, maximizing accessibility by *Smarter Travel* in order to promote sustainable planning objectives;
- Improve access to town centres by facilitating opportunities for public transport, cycling and walking whilst also ensuring sufficient short term parking is available to meet the needs of car borne shoppers; - securing a sustainable pattern of retail development requires a reduction in the reliance on the private motor vehicle. This has to be balanced with ensuring a successful shopping centre which will necessitate accessibility by car for some shoppers;

- Include criteria based policies to guide developers on how to assess the potential of sites to accommodate new retail development and to guide the determination of such applications; - in a plan led system it is important to provide flexible planning policies which are capable of being applied to different types of development at different stages in the life of the Plan. The factual circumstances against which applications are determined will change over time and criteria based policies will allow these changes to be taken into account when determining planning applications.

5.3 Strategic Policy Approach to Retail Development

This Retail Strategy has been developed in accordance with the Retail Planning Guidelines for Planning Authorities produced in January 2005 and is intended to follow the policy guidelines therein. The preferred location for new retail development where practicable and viable is within existing town centres, subject to the strategies for individual centres below. Where it is not possible to provide the form and scale of development required, having adopted an adaptable and flexible approach to appraising sites and buildings, development should be undertaken in accordance with the sequential approach both in the preparation of Development Plans and the determination of planning applications. It is emphasised that this summary is not intended to replace the approach set out within the Retail Planning Guidelines; however, the following strategies for individual centres are intended to provide focused strategies for the specific centres considered by this report.

The Retail Planning Guidelines set out primary considerations for the development of retailing in the county. The key elements are set out below.

5.3.1 The County Retail Hierarchy

The County Retail Hierarchy is set out in Chapter Four. In assessing proposals for new retail development careful consideration must be given to how the proposal will ensure that the county retail hierarchy can be strengthened. Proposals for new retail floor space should strengthen rather then undermine the structure of the County Retail Hierarchy.

5.3.2 The Primary Retail Areas of County Towns

Primary Retail Areas (PRAs) are set out in each of the four main settlements, and are illustrated in Appendix 2. The emphasis in the Retail Planning Guidelines is on town and village centres, their enhancement, redevelopment and expansion. Therefore, the priority is on locating new retail development within PRAs and on edge-of-centre sites within close walking distance of the PRAs.

5.3.3 Appropriate Spatial Distribution of New Retail Development

The County Retail Hierarchy sets out the framework for the general spatial distribution of convenience and comparison floor space, as follows;

Nenagh Convenience and high order comparison retailing is appropriate, the scale of which should not compete directly with Tier 3 Level 1 and higher settlements. Balanced retail growth is required with a renewed focus on town centre vitality and viability.

Thurles Convenience and mid-to-high order comparison is appropriate, however, the scale of which should not compete directly with Nenagh as the Main County town.

In order to consolidate their positions as Tier 3 – Level 2 settlement strong and vital town centres

should be fostered in both towns. Thurles has grown at a similar rate as Nenagh, and in order to enhance its retail offer additional convenience and comparison retailing in the central area is desirable.

Nenagh and Thurles are both identified as Tier 3, Level 2 centres. They both share characteristics, being attractive historic market towns with a good range of both convenience and comparison goods retailing with the potential for future enhancement. Given their respective locations the potential for enhancement lies in modest scale improvements to the existing provision and/or trying to improve their tourist/visitor attraction.

The strategy for Nenagh and Thurles is:-

- Support the improvement of retail facilities in Nenagh and Thurles Town Centres so as to improve the service they provide to their local catchment populations;
- Seek to improve the suitability of town centre retail accommodation for modern retailers, whilst preserving the town's attractive historic character;
- Encourage a new focus of out of centre bulky comparison goods retail provision in suitable areas, limiting the range of goods which can be sold from any new permission by condition to those that will not compete with the Town Centre
- Encourage the provision of tourist and visitor orientated retail provision to capitalize on the inherent potential of these centres.
- Harness the potential of any appropriate opportunity/brownfield sites within or adjacent to the town centre.
- Maintain and expand the attractive network of independent fashion boutiques and other speciality shops in the town centre, which combined with the character of the town and its public space creates a niche shopping experience for residents and tourists.

Templemore and Roscrea Basic convenience shopping and lower order comparison shopping is appropriate. Due to natural growth Roscrea has developed the attributes of a Tier 3 – Level 2 settlement.

These Tier 4 centres tend to have a more limited offer of comparison products, typically lower order, and their primary function is the provision of convenience goods and everyday services. Roscrea offers the best range of convenience products, and also benefits from its tourist and visitor attraction, which allows it to support a wider range of comparison goods than would be justified by its local catchment population. Templemore also has the potential to benefit from visitor expenditure. The primary objective for this centre is to enhance the quality of its convenience goods provision enabling the construction of modern food store outlets such as has already been provided in Roscrea (Supervalu, Tesco and Dunnes Stores).

The Strategy for Templemore and Roscrea is to:-

- Support these towns as important centres for the provision of convenience goods and retail services;
- Encourage the provision (where not already provided) of good quality convenience outlets capable of supporting a main food shopping trip in or on the edge of the town centre;
- Support the provision of non bulky and bulky comparison goods outlets in the town centre where these are aimed at meeting the needs of the local catchment population.
- Harness the potential of any appropriate opportunity/brownfield sites within or adjacent to the core retail area.

- Maintain and expand the attractive network of independent fashion boutiques and other speciality shops in the town centre, which combined with the character of the town and its public space creates a niche shopping experience for residents and tourists.

District Service Centres Development of rural shops, post office and similar type services appropriate, as retail development is necessary for the support of social and economic rural life. The District Service Centres have a greater capacity for retail growth than the other rural villages.

Local Service Centres and Settlement Nodes Development of rural shops, post office and local services appropriate, as retail development is necessary for the support of social and economic rural life. Self-sufficiency of rural villages for basic convenience retailing is desired.

The Tier 5 centres can be separated into three levels, the District Service Centres represent Level 1, the Local Service Centres represent Level 2 and the Settlement Nodes represent Level 3. Examples of Tier 5 centres include Newport, Ballina, Borrisokane, Borrisoleigh, Cloughjordan It is acknowledged that the self-sufficiency of all Tier 5 settlements is reliant on ensuring that local services and retail facilities are provided at the appropriate scale in each village.

These centres comprise small local parades with very limited car parking which meet the daily needs of a very local area. Their function is extremely important locally to meet 'top-up' convenience goods shopping needs (i.e. those products which need replacing between main food shopping trips) and to provide local services, including the provision of takeaway food. From a policy perspective they are also important as they constitute a sustainable provision of retailing, removing the need to travel and also thereby reducing levels of congestion. Whilst it is unlikely that these centres will attract sufficient expenditure to support large scale provision of retail or comparison goods, they remain an important focus of the community and consequently their continued vitality and viability should be supported. The focus of provision will be on ensuring the creation of new floor space which meets the needs of local people, whether that is the construction of additional units to meet retailer demand, or the qualitative improvement of existing floor space to allow an enhanced level of services to be provided. It is unlikely that the scale of development in these centres will ever be such that it will undermine the continued vitality and viability of any higher order centres, or other centres at the same level in the retail hierarchy due to the distance between centres.

The strategy for neighbourhood centres, small towns and village centres is to:-

- Support the provision of modern convenience goods stores, of an appropriate scale, and associated retail and service units to enable these centres to meet the day to day needs of their local catchment population.

Local and corner shops meet the daily needs of local people. These facilities can be either provided independently, perhaps along a major arterial route or within new residential areas, or in conjunction with other services such as a petrol filling station. Again the focus of these stores is on the provision of very local level day-to-day needs and provided that this function is met, it is unlikely ever to be of a scale which will have any material impact on town centres at any level in the hierarchy.

The strategy for local shops is:-

- To support the provision of small scale shops to meet the day to day requirements of local people;
- Promote local shops to meet a gap in provision where this would achieve regeneration benefits.

5.3.4 Consideration of Need for new Retail Floor Space

The need for new retail floor space can be estimated by examining existing and permitted retail floor space and consumer expenditure patterns to determine whether or not there is sufficient retail floor space to meet consumer expectations. The consideration of need at the strategic level must take also account of the following;

- **County's Competitiveness**

The retention of the County's competitive position is a key objective of the County Retail Strategy. At present, North Tipperary has a high level of both convenience and comparison expenditure retention. As the main county town, Nenagh, Thurles and Roscrea must retain their competitiveness against the main competing retail locations of Kilkenny, Limerick, Ennis and Clonmel. To ensure that this continues, the main focus for new retail development must be town centres, especially on the development of existing vacant sites in the town centres and the improvement of the appearance and attractiveness of the town centres for shoppers.

- **Distribution of New Retail Floorspace**

Over the lifetime of the County Retail Strategy 2003, floorspace provision for bulky comparison goods has increased. This has addressed a deficiency in retail warehousing floorspace that was identified in the 2003 Strategy. New retail warehouse developments have been constructed in Nenagh, Thurles and Roscrea. At present there are a number of units vacant in Nenagh and Roscrea.

The reuse and redevelopment of vacant town centre floorspace in the county's main centres is a sustainable option for new retail development as an alternative to the development of edge-of-centre or out-of-centre greenfield sites. It has been identified that there are suitable unoccupied sites within each of the town centres for new retail development. It is the key focus of the Retail Planning Guidelines that the town centres and PRAs should be enhanced, therefore, it is considered in view of existing and permitted floorspace in the county that the main focus of this County Retail Strategy should be on the redevelopment of town centres for high end and niche comparison retailing.

5.4 Implementation Strategy

North Tipperary County Council, Nenagh Town Council, Thurles Town Council and Templemore Town Council have all adopted Development Plans which requires the implementation of the County Retail Strategy. As a consequence this Strategy should be ***adopted/noted*** by each Council. This Strategy will replace the existing North Tipperary Retail Strategy 2003 and subsequent Variations to development Plans should ensure they are consistent with this Strategy.

5.4.1 Proposals for Continued Monitoring

This Retail Strategy has been prepared on the basis of a snapshot of the base line information available in 2011, having regard to future needs. The retail sector is, however, a dynamic one, dependent not only upon the national economic climate but also upon how particular towns are faring in respect to their neighbours. The objective of a planned approach is to ensure provision of retail facilities in accordance with the principles of sustainable development and which meet the needs of local people. It is therefore essential to monitor how the strategy is performing in terms of actual provision, and also whether the base line assumptions are being borne out in the future economic climate. Accordingly, it is the intension that the following factors are monitored over the life of the strategy:-

- **Population Growth** – increasing population is one of the primary determinates of the need for additional retail floor space. It is recommended that projections of population growth adopted in the quantitative retail floorspace assessment are reviewed on a regular basis.
- **Expenditure Growth** - Estimates of expenditure per person are also important to assessing the need for new retail floorspace. Such estimates can change significantly with fluctuations in the national economy. It is recommended that levels of annual growth be reviewed on a regular basis.
- **Existing Retail Floor Space** – the quantum of existing retail floor space is one of the key inputs into the quantitative retail floorspace needs assessment. This report has verified the floor space figures utilised by the Mid West Retail Strategy 2009 and updated the information to March 2011.
- **Changes in Retail Floorspace** - a register of new retail planning permissions will be maintained subject to resources. This register will attempt to categorise development by the type of goods sold (non bulky, bulky and convenience), the gross and net floorspace, including net additional floorspace where an existing retail facility is redeveloped, and should identify any restrictions on the range of goods which can be sold.

- **Commercial Indicators of Vitality and Viability** – it is possible to obtain other indicators of how centres are functioning, in particular rental levels, yields and retailer requirements. These indicators are notably uncertain in the current economic climate but as a generality provide an indication as to how a centre is performing over time and in comparison with other centres. A time series database may be established to allow comparison between centres on an established set of parameters over time subject to resources and staff availability.
- **Shopping Patterns** –Shopping patterns will change over time due to improved transport facilities and the development of new shopping provision, or the improvement of existing retail facilities. Additional survey work in this regard may be necessary subject to resources.
- **Town Centre Healthchecks** – in order to develop and maintain an understanding of how centres are performing and changing over time, on-going town centre "healthchecks" may be undertaken to augment the commercial indicators of vitality and viability. Again the key objective is to collect data on a range of indicators which can be used to undertake a time series analysis for an individual centre and allow comparison with other

centres. At a minimum it is intended that subject to resources, data is collected on the number and types of occupiers and the number of vacancies. The retail health of Nenagh, Thurles, Templemore and Roscrea should be continually monitored over the lifetime of this County Retail Strategy. This will facilitate the next review of the County Retail Strategy and allow the Council to monitor the health of retailing in the County.

5.4.2 Development Management

The development management process is fundamental to delivering a successful Retail Strategy. The failure at this stage to fully examine the issues highlighted and recommendations will result in the revised Retail Strategy having little meaning except at a very general level. For this Strategy to have a real impact, it is important that the Planning Authority(s) in deciding on planning applications, take into consideration both the impact of the development itself, and the development in conjunction with other recently approved or proposed developments, on the retail sector, both within their own administrative area and on centres within the County as a whole and on Limerick City centre as the main Regional Shopping destination.

(i) Retail Impact Assessments

It is not the purpose of the planning system to prevent competition. However, it is appropriate for planning policies to promote healthy town centres in the public interest. Where new developments would compromise this goal, they should be rejected.

The Retail Planning Guidelines 2005 place the onus on the applicant to demonstrate there will not be a material adverse impact on the vitality and viability of any existing town centre arising from their development. Applicants should therefore address the following criteria and demonstrate whether or not the proposed development would:-

- support the long term strategy for town centres as established in the Development Plan and not materially diminish the prospect of attracting private sector investment;
- cause an adverse impact on town centres, either on its own or cumulatively with recent developments/extant planning permissions, sufficient to undermine the quality of the centre or its role in the economic and social life of the community;
- diminish the range of activities and services a town centre can support;
- cause an increase in the number of long term vacancies in the primary retail area;
- ensure high standards of access by a range of means of transport including public transport, by bicycle, by foot and also by the private motor car, so that the development is accessible to all sections of society;
- link effectively with existing town centres so there is likely to be commercial synergy.

The level of detail provided in a retail impact assessment should be proportionate to the scale and nature of the proposal and should focus on the key issues.

(ii) Sequential Test

The sequential test should be stringently applied to the assessment of all retail proposals other than those intended to serve a local population. It is a fundamental part of the National and Regional Retail Strategies to seek to direct new

retail development to town centres and thereby capture the benefits that this can bring forward in terms of protecting and enhancing existing centres, sustainable development and social inclusion. It is important to ensure that the scale and function of the proposed retail development accords with that of the centre in which it is to be situated.

In planning terms, applicants should be able to demonstrate that in undertaking the sequential test, they have been flexible about their proposed business models in terms of:-

- The scale of their development;
- The format of their development;
- Car parking provision; and
- The scope for disaggregation.

In seeking to demonstrate flexibility, developers and operators should consider the scale of the proposed development, perhaps reducing the retail floor space proposed or considering more innovative layouts and store configuration such as multi-storey developments with a smaller footprint. Reduced or re-configured car parking should also be a priority, especially in areas which are usually accessible by public transport. When seeking to demonstrate that certain sequentially preferable sites are not appropriate, applicants should provide clear evidence to demonstrate why in the following terms:-

- Availability: the sites are not currently available and are unlikely to become available for development within a reasonable period of time (to be determined by the relevant Planning Authority but typically five years);
- Suitability: sites are not suitable for the type of development proposed;
- Viability: the development would not be viable on the proposed site due to the costs of construction/implementation.

The amount of information necessary to demonstrate compliance with the sequential test should be proportionate to the scale of the development proposed.

(iii) Retail Development on out-of-town sites

The support of the continuing role of town and district centres is a key objective of the RPGs, to assist in reinforcing the investment in urban renewal which has already been made. These established centres should be the preferred locations for developments that attract many trips. The preferred location for retail development should be within town centres. According to the RPGs there is a presumption against large retail centres located adjacent to or close to existing, new or planned national roads/motorways.

The County Development Plan 2010-2016 supports these objectives and it is the objective of the County Settlement Strategy to direct new development to existing settlement centres. There is a clear presumption against large-scale new retail development outside of settlement centres or in locations adjacent to the existing or proposed national road network.

It is stated that visitor accommodation, interpretation centres and commercial/retail facilities serving the tourism sector should generally be located within established settlements thereby fostering strong links to a whole range of other economic and commercial sectors and sustaining the host communities. Where new retail development associated within tourism developments are proposed, they will be assessed in accordance with the policy of the County Development Plan 2010-2016.

(iv) Retail Need

Whilst it is not a requirement of the 'Retail Planning Guidelines for Planning Authorities' that planning applications are supported by retail need assessments, due to the current level of provision in the County it may be necessary in particular instances that such assessments should form part of the retail impact assessments. A lack of quantitative retail need is indicative that a proposal will have a greater impact than if there is a need. Such assessments therefore provide a useful context against which to consider the material impact consequences.

Need assessments should consider both the quantitative and qualitative need for a proposal and examine the scope to increase the market

share of a centre and/or for regeneration benefits to be achieved.

(v) The Use of Conditions

Effective use should be made of conditions to define the terms of new planning permissions to ensure they accord with the Retail Strategy Strategic Objective. Conditions may be imposed to:

- Prevent retail development from being sub-divided into a number of smaller shops; or to specify the maximum size of units;
- Limit the maximum amount of floorspace (especially that devoted to retail trading) which can be provided. For the purposes of clarity the ability to erect mezzanine floors within the buildings should be removed;
- Define the range of goods which can be sold with reference to specific goods types.

5.5 Conclusions

It is the objective of the Council to develop the retail base of the county in line with the County Retail Hierarchy and in line with the objectives and policies of each Development Plan and Local Area Plan.

The County Development Plan sets out polices and objectives for new retail development in the District Service Centres, Local Service Centres, Settlement nodes and in rural areas. Nenagh, Thurles and Templemore have statutory Development Plans. Roscrea is the largest of the settlements that do not have statutory Development Plans but it has a dedicated Local Areas Plan.

The polices and objectives of each current Development Plan and Local Area Plan conform to the requirements of the RPGs and form the statutory framework for the development and enhancement of retailing in the county and these policies and objectives shall be applied to inform planning decisions at a local level.

It is likely that some of these Plans will be reviewed in accordance with their statutory timeframes or be subject to variation over the lifetime of the County Retail Strategy. At this stage any review of statutory Development Plans or Local Area Plans shall have regard to and build upon the findings of this County Retail Strategy and any review thereof.

6.0 ACTION INITIATIVES FOR TOWN CENTRE IMPROVEMENT

6.1 Introduction

It is set out in the RPGs that each Development Plan should set out polices and action initiatives to encourage the improvement of the town centres. The existing Development Plans and Local Areas Plans contain a broad range of polices and objectives that are designed to both enhance the town centre and stimulate retail growth. These include the identification of development opportunities, site assembly, better access for public transport, cyclists and pedestrians and environmental improvements including improving the attractiveness of townscape and open spaces. Priority action initiatives that will form a framework for the implementation of actions for town centre improvement are set out below;

6.2 Reuse and refurbishment of Disused, Underused and Derelict Sites

It is an objective of each of the Development Plans and Local Area Plans for the four largest settlements to regenerate urban areas through the redevelopment of existing underused, disused or derelict buildings. This is especially important in town centres where disused or vacant properties both undermine the visual quality of the streetscape and represent unavailed of commercial opportunities. It is set out in the RPGs that renewal opportunities may also arise where underused property and land might be brought back into more productive use through joint action, using Section 212 of the Planning and Development Act, 2000-2010 or through other initiatives such as Integrated Area Plans. Existing policy is set out in Table 6.1 below.

An action initiative for the implementation of these policies is set out as follows:

Action Initiative 1: Reuse and Refurbishment of Disused and Derelict Sites

The Council will develop the following initiatives in the central areas of each main county town, commencing with the PRA of each town as phase 1.

(a) The Council will actively encourage the reuse and refurbishment of disused or derelict sites within the town centre and especially within the PRA.

(b) The Council will initiate an active programme of enforcement and regeneration under the Derelict Sites Act 1990 and the Planning and Development Act 2000 – 2010 respectively to enhance and revitalize the town centre areas subject to resources.

Table 6.1 Summary of policies that address the reuse and refurbishment of Disused, Underused and Derelict Sites

Plan Title	Details
Nenagh and Environs Development Plan 2007-2013	Policy ENV 21: Derelict Sites Policy ENV 22: Obsolete Areas Appendix 3: Development Briefs and Opportunity Sites
Thurles and Environs Development Plan 2009-2015	Policy ECON 11: Derelict Sites Policy ECON 12: Obsolete Areas Policy ECON 13: Opportunity Sites Appendix 3: Site Specific Development Briefs
Templemore and Environs Development Plan 2006-2012	Policy ECON 11: Derelict Sites Policy ECON 12: Obsolete Areas Policy ECON 13: Opportunity Sites Appendix 3: List of Opportunity Sites
Roscrea Local Area Plan 2006-2012	Policy ROS 2: Opportunity Sites Policy ROS 28: Derelict sites Policy ROS 29: Obsolete sites Appendix 5: Opportunity Sites

6.3 Town Centre Enhancement

The physical enhancement of the town centre area is critical to promote viability and vitality and to ensure that customers feel safe, enjoy well maintained surroundings and have the facilities and amenities they need in carrying out their business. The typical attributes of an attractive town centre are as follows:

- Attractive riverside/Parkside locations
- High quality public seating, bins, public lighting and signage
- Landscaping and seasonal planting programmes
- Protection and enhancement of cultural or historical features / amenities
- Use of quality and locally sourced materials i.e. paving, natural stone kerbs
- Distinctive architectural conservation areas where appropriate
- Highly maintained private properties and shop fronts.
- Improved accessibility for all

Tailor-made objectives and polices for town centre enhancement are set out in each Development Plan and Local Area Plan. In addition, dedicated town centre improvement plans and guidelines have been prepared for a number of the main county towns. These Plans may be used by the Council, the community and private developers in achieving the best quality approach to design and finish and by the town engineers/overseers in carrying out works within the town centre. Both a programme of facilitation and encouragement and a programme of enforcement where necessary, is required to improve the visual appearance of the Town Centres.

Action Initiative 2: Town Centre Enhancement

The Council will actively support the enhancement of the town centres as follows:

(a) The Council will liaise with all stakeholders to encourage and support the active enhancement of the town centre in line with current planning policy and objectives.

(b) The Council will undertake enforcement action where necessary to address issues such as littering, unauthorised signage and derelict / disused properties.

(c) Any review of an existing Development Plan or Local Area Plan shall include an assessment of town centre quality and shall set out policy and objectives designed to enhance the special character of town centre areas.

(d) The Council will actively seek the implementation of Enhancement Schemes in conjunction with the Community.

6.4 Public Realm and Accessibility

Safe and direct public accessibility is a critical issue for town centre vitality. It is critical that all opportunities for public movement throughout the town centre are identified at planning stage. Accessibility to car-parking and security are powerful incentives for shoppers. In order to enhance vitality it is also important to provide for the needs for visitor access to cultural or historical features and proximity to entertainment and refreshment facilities.

Existing out-of-Centre shopping centres enhance the overall retail profile of the towns. It is important that opportunities for improvement of public accessibility between these shopping centres and the town centres be assessed and provided.

Action Initiative 3: Public Realm and Accessibility

The Council will actively enhance accessibility within town centres as follows:

(a) The Council will prepare Public Realm Plans for Nenagh, Thurles, Templemore and Roscrea over the lifetime of this County Retail Strategy, subject to resource availability.

6.5 Retail Impact

The North Tipperary County Development Plan 2010-2016 sets out a requirement for planning applicants to submit a sequential test approach and a Retail Impact Assessment (RIA) in respect of net retail floorspace above 100sq.m.

It is acknowledged that the self-sufficiency of all Tier 4 and 5 settlements is reliant on ensuring that local services and retail facilities are provided at the appropriate scale in each village. It is envisaged that the RIA process will be useful tool in highlighting the needs of local communities with regards retail provision.

Action Initiative 4: Retail Impact Assessment

The Council will consider the capacity of community facilities including retail facilities at Planning Application stage in Tier 4 and 5 settlements as part of the consideration of Retail Impact Assessment.

6.6 Casual Trading, Country and Farmers Markets

There has been a recent revival in public interest in open air/farmers markets. At a Farmers' Market, farmers, growers or producers (usually from a defined local area) are present in person to sell their own produce direct to the public. Farmers' Markets give local producers the opportunity to sell their goods directly to consumers. Farmers' markets are held weekly or monthly in many Irish towns and cities Ireland. Markets enhance local self-sufficiency, reduce transportation costs and enhance and stimulate interest and trading in towns. Farmers markets are most effective when they are located in the central area of towns, where customers can avail of parking and do their shopping in the existing town centre shops. Open air markets must be of sufficient scale to permit traders erect their stalls and power and water should be made available.

Country Markets have been a co-operative business for over 60 years. It is a national organisation with branch markets in most counties in the country. These indoor markets generally operate one day a week to market the shareholders' fresh farm, garden and home produce and handcrafts.

Nenagh's Farmers Market is located every Saturday in the grounds of Quintins Way and at Teach an Léinn... They operate from 10am to 3pm and farmers selling produce at the market operate under a 'bulk casual trading licence'. A Country Market is also held at the New Institute on Friday mornings. Casual Trading takes place in Johns Lane Car Park from Thursday to Saturday every week. Thurles has an active farmer's market every Saturday that trades from 9.30am to 12.30pm and is located on the grounds of the Greyhound Stadium. Casual Trading is permitted in Parnell Street Car Park on Saturdays. Templemore has a farmer's market every Wednesday that trades from 9am to 3pm and is located on the Main Street. Casual Trading also takes place on Main Street on Thursdays. Roscrea's country market takes place every Friday at 2.15pm in the Abbey Hall.

Source: www.bordbia.ie

Action Initiative 5: Casual Trading and Farmers Markets

The Council will actively engage with operators of causal trading and farmers markets and with the relevant Chamber of Commerce to investigate opportunities to facilitate and enhance regulated causal trading and farmers markets in appropriate town locations.

6.7 Public and Private Transport

The RPGs state that heavy demand for access by car generates demand for parking spaces which can create congestion, pollution and parking problems, affecting the convenience, attractiveness and competiveness of the town centre. These issues can be offset be ensuring that good access to the town centre is provided and that there is a long-term strategy in place to develop public transport systems. The location of retail development in out-of-town locations militates against both of these objectives. This highlights the need to develop a strong retail base in the town centre and to support this objective with transportation planning. The RPGS set out the following objectives for planning authorities:

- Develop a comprehensive traffic management strategy and in particular establish clear parking policies.
- Ensure that parking provision serves the need of the town centre as a whole, rather than exclusive use of a particular development.
- Work with public transport operators to improve services and facilitate the provision of park and ride schemes associated with new development and to serve the town centre as a whole.
- Meet the access and mobility needs of disabled people.
- Improve access and safety for cyclists and pedestrian visitors through the introduction of cycle routes, pedestrian streets and park and walk schemes and incorporating a careful appraisal of the safety aspects of new development proposals.

The Council has supported local initiatives to enhance transport in the main county towns. The following schemes are already in place:

1. Restriction of long-term car-parking in the central areas.
2. Public and private bus service throughout the county.
3. Installation of cycle routes in some of the main county towns.

These issues represent the first steps in improving transport in and between the main county towns.

Action Initiative 7: Public and Private Transport

Any review of an existing Development Plan or Local Area Plan shall incorporate the following:

(a) Preparation of a detailed cycle strategy for the town, considering main residential areas and main retail areas, with route layouts and cycle parking facilities.
(b) Determination of the need for town centre short term car-parking and long-term car-parking and prepare an appropriate strategy for providing for appropriate levels of both.
(c) Continue to meet the access and mobility needs of the population.

6.8 Partnership Approach

Town centres are active and complex environments and the fabric and vitality of each town centre is a direct result of the interest of all the stakeholders involved. This review of the

County Retail Strategy will published in draft form and placed on public display for a period of six weeks during which time the input of all stakeholders by way of written submissions and observations will be invited. Stakeholders include:

- The general public,
- Traders Associations,
- Business owners/operators,
- Chambers of Commerce,
- Failte Ireland,
- North Tipperary Community and Voluntary forum etc.

The final County Retail Strategy 2011 therefore will involve the input of interested parties. Going forward, the Council's involvement in the day-to-day operation of the town centre must be carried out in ongoing partnership with local stakeholders. The involvement of all stakeholders to encourage the amalgamation of town centre sites as a means to provide larger town centre sites will be especially encouraged.

Action Initiative 8: Partnership Approach

The Council will actively foster an interactive and partnership approach with all stakeholders during the lifetime of the County Retail Strategy and any review thereof.

7.0 CONCLUSIONS

The previous Retail Strategy was adopted in 2003 and covered the time frame of 2003- 2011, whilst the new Strategy extends the period to 2017. The three key requirements of the study are as follows:-

- to review retail development and retailer trends within North Tipperary since the 2003 Strategy was adopted;
- to produce up to date information on the quantum and range of retail offer available in the County, and compare it against what was available in 2003; and
- to use the results of this assessment to update the 2003 Mid West Retail Strategy and to set out policies and recommendations to guide the retail strategies and policy initiatives of the Councils.

North Tipperary is at an important crossroads. Further large scale retail development may result in, possibly irreversible, detrimental impacts on some centres. It is essential for the provision of new retail development to be coordinated across the County to create a balanced pattern of provision in accordance with the broad objectives of the National Development Plan 2007, the Retail Planning Guidelines 2005, the Mid-West Regional Planning Guidelines 2010 and the County Development Plan 2010-2016, while also having due regard to promoting and protecting sustainable County, Regional and national economic and employment growth and the promotion of social inclusion.

The new Retail Strategy emphasises the importance of Limerick City Centre. It is important that it maintains its dominant retail function within the Region.

Accordingly, a Strategy is recommended which has a bias in favour of the Tier 1 towns in order to provide them with sufficient protection that as the economy recovers; developers will consider it worthwhile spending the time and effort to undertake the more complex site assembly activities essential to bring forward development.

In general, the Retail Strategy seeks to encourage appropriately scaled new retail development in the town centres of the main towns in the County.

Elsewhere, significant changes in the role and function of the identified centres are not anticipated. However, allowance should be made for them to improve their retail provision in accordance with their existing role and scale, so that they can continue to improve their service to their local catchment population.

This approach should result in a balanced pattern of retail development, allowing each centre to fulfil its role without having a harmful impact on its neighbours.

APPENDIX 1: MONITORING

The retail health of Nenagh, Thurles, Templemore and Roscrea should be continually monitored over the lifetime of this County Retail Strategy. This will facilitate the next review of the County Retail Strategy and allow the Council to monitor the health of retailing in the County.

Two forms of monitoring should be carried out, as follows:
1. Retail Health Checks
2. Floor Space Records.

Retail Health Checks

It is recommended that two retail health checks be carried out;

1. Primary Retail Area Health Check.
This health check determines percentage vacancy and diversity of uses at ground floor level in the PRA of Nenagh, Thurles, Templemore and Roscrea. This health check is an indicator of vitality and viability of town centres. A Methodology for this assessment is set out in Appendix 2.

2. Retail Warehouse vacancy rate
This exercise comprises of a count of occupied and vacant units within existing retail warehouse parks in Nenagh, Thurles, Templemore and Roscrea. This health check will determine the percentage vacancy within existing retail warehouse developments and is an indicator of demand for retail warehouse floorspace. This assessment should be carried out by the Planning Authority on a regular basis to facilitate and inform the decision making process.

Floorspace records
Floorspace data should be kept up to date through the monitoring of planning permissions for both new retail floorspace and change of use. Records should be kept for new planning permissions for retail development according to retailing category i.e. retail warehouse, comparison, convenience etc. It is also recommended that a separate record be maintained for commencements of new retail developments.

APPENDIX 2: METHODOLOGY FOR PRIMARY RETAIL AREA HEALTH CHECK

Retail health checks on the PRA of Nenagh, Thurles, Templemore and Roscrea should be carried out once a year, subject to resources. The PRA for each of these towns is set out in the figures below, and subject to resources the same PRA should be reviewed each year to ensure consistency. The health check assessment should be carried out on ground floor units only and will record vacancy rate, diversity of uses and percentage of high, medium and low value uses in the PRA.

Use types should be categorised as follows:

High Retail Value
Category 1 includes all retail uses.
Category 2 includes all hostelries i.e. pubs, restaurants, hotels, takeaways etc.

Medium Retail Value
Category 3 includes all service units i.e. hair dresser, educational, health and beauty. Also included were the following public services that generally remain open on Saturdays; Post Offices and Credit Unions.

Low Retail Value
Category 4 includes all office type uses including banks, bookmakers and auctioneers.
Category 5 refers to ground floor residential uses.

Methodology
Using maps outlined below, the PRAs should be inspected on foot. The following survey sheet should be used to record the status of each unit. All survey sheets and maps can be bound into one survey book to ensure that records can be maintained from year to year. After a full survey is carried out in each town the percentage of each unit type be calculated and the percentage vacancy calculated. This survey should be carried out in January 2012; a comparison should be made in the status of retailing within each PRA.

Reference	Unit Name	Unit Location	Use Category	Vacant
1	Eason's	Pearse street	1	N
2	Supermacs	Pearse street	2	N
3	pTSB	Pearse street	4	N
…				

APPENDIX 3: GLOSSARY OF TERMS

Bulky Goods Retailing
Goods generally sold from retail warehouses where DIY goods or goods such as flatpack furniture are of such a size that they would normally be taken away by car and not be manageable by customers travelling by foot, cycle or bus, or that large floor areas would be required to display them e.g. furniture in room sets, or not large individually, but part of a collective purchase which would be bulky e.g. wallpaper, paint.

Comparison Retailing
This type of retailing includes:

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

Convenience Retailing
This type of retailing includes:

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

Discount Food Store
A single level, self service store normally of between 1000 – 1500sqm of gross floorspace selling a limited range of goods at competitive process, often with adjacent car-parking.

Expenditure per Capita
Average expenditure per person in a particular area. In Ireland this calculated every five years by the CSO. The last expenditure per capita calculation was for 2004/2005, the next will be for 2009/2010.

Expenditure Leakage
Loss of retail revenue from a catchment area due to persons living in that catchment doing their shopping outside of the catchment.

Floorspace
Net retail floorspace is the area of a shop or store that is devoted to the sales of retail goods. This is distinguished from gross floorspace, which includes the sales area, plus storage space, offices, toilets, other staff facilities and circulation space.

Independent retailer
Privately owned retail outlet not affiliated to any multiple operator. Usually small family run shops.

Market Share
The percentage of total retail expenditure by persons living in the study area that is spent in retail outlets located in the study area. That remaining proportion that is spent in other areas outside of the study area is often referred as l*eakage*.

Primary Retail Area (PRA)
This is the central retail area of a town, is usually located in the historic and social core of a town and incorporates the 'Prime Pitch'/Core Retail Area. Typical uses located in the PRA include high-end and niche comparison shopping. Office based uses are usually restricted in the PRA in order to retain high-end retailing uses at ground floor level. Non-retail uses are generally directed to the secondary retail areas located in the streets directly adjoining the PRA. The PRA is defined in each relevant Development Plan and is subject to change over time as the town expands in size.

Prime Pitch
That part of the retail area of a town centre or retail mall where pedestrian flows are greatest, competition for representation is greatest and rents are noticeably higher than elsewhere.

Retail Area
That part of a town centre which is primarily devoted to shopping.

Retail Warehouse
Large-single level store specialising in the sale of bulky household goods such as carpets, furniture and electrical goods, and bulky DIY items, catering mainly for car-borne customers and often in out-of-centre locations.

Retail Sales Index (RSI)
These show the Volume adjusted and Value adjusted figures for all businesses from January 2000. The RSI is based on sampling from various retail outlets of different sizes and it can also be a good indicator of consumer confidence.

Retail Impact Assessment
A form of appraisal and forecasting to evaluate the effect of a proposed development usually on the vitality and viability of town centres

Sequential Test
This test sets out the guiding principles for the location of new major retail schemes. In the first instance, the priority should be in locating new retail development within town centres. If town centre locations are not readily available within a reasonable and realistic timescale then edge of centre sites should be looked to i.e. sites that are within 300-400 meters of the PRA. Only after the options for town centre and edge of centre are exhausted should out of centre locations and sites be considered.

Trade Draw
The proportion of total expenditure in retail outlets located in the study area that is due to persons living outside the study area.