

**South Tipperary County
Council**

**SOUTH TIPPERARY COUNTY
RETAIL STRATEGY**

Final Report

1 September 2003

South Tipperary County Council

**SOUTH TIPPERARY COUNTY
RETAIL STRATEGY**

Final Report
by



Planning, Economic & Development Consultants

Ormonde House,
12-13 Lower Leeson Street,
Dublin 2

Tel: 01 639 9360

Fax: 01 639 9396

Also at
Belfast, Birmingham, Bristol, Cardiff, Edinburgh,
Leeds, London, Manchester and Reading

in association with

**DTZ Sherry FitzGerald
Lansdowne Market Research**

1 September 2003

CONTENTS

SECTION	PAGE
EXECUTIVE SUMMARY	
1. INTRODUCTION	1
2. BASELINE FOR THE STRATEGY	9
3. BROAD ASSESSMENT OF ADDITIONAL FLOORSPACE	29
4. THE RETAIL HIERARCHY	35
5. RETAIL DEVELOPMENT POTENTIAL	45
6. STRATEGIC RESPONSE – THE COUNTY RETAIL STRATEGY	57

APPENDICES

A – GLOSSARY OF TERMS

B – LIST OF SUBMISSIONS RECEIVED

C – TECHNICAL APPENDIX (SEPARATE DOCUMENT)

Quality Assurance Record	
Checked By	
Date	
Authorised by	
Date	
Ref: P/8137/01- 1 September 2003	

EXECUTIVE SUMMARY

1. **DTZ PIEDA CONSULTING** in association with **DTZ Sherry FitzGerald** and **Lansdowne Market Research** was appointed in April 2002 by South Tipperary County Council to prepare the Retail Strategy for the County. The County Council adopted the County Retail Strategy on 1 September 2003.
2. In accordance with the '*Retail Planning Guidelines for Planning Authorities*', (RPG) published by the Department of the Environment and Local Government (DoELG) in December 2000, South Tipperary County Council is required to prepare a Retail Strategy for the County. The retail policies and proposals that emerge from the Retail Strategy require to be incorporated in development plans. The RPG state that the matters to be addressed in all future development plans are:
 - i Confirmation of the retail hierarchy, the role of centres and the size of the main town centres;*
 - ii Definition in the development plan of the boundaries of the core shopping area of town centres;*
 - iii A broad assessment of the requirement for additional retail floorspace;*
 - iv Strategic guidance on the location and scale of retail development;*
 - v Preparation of policies and action initiatives to encourage the improvement of town centres; and*
 - vi Identification of criteria for the assessment of retail developments.*

Founded on the other principles set out in the RPG, the focus of the County Retail Strategy has been these six factors.

BASELINE FOR THE STRATEGY

3. The detail of the baseline information that is specific to the County Retail Strategy is contained in a separate Technical Appendix. In this report – the County Retail Strategy – the focus is on the key facts and information that underpin the development of the Strategy.
4. **Population Levels and Forecasts:** the preliminary results from the 2002 Census of Population show that the population of South Tipperary reached 79,213 in 2002, an increase of 3,699 persons over the period since 1996. During this period of unprecedented growth at the national level, the towns of Cashel, Carrick-on-Suir, Cahir and Fethard have experienced strong growth, while Clonmel and Tipperary Town have also grown but at a slower rate. The population forecasts contained in the County Housing Strategy and the Draft County Development Plan anticipate the population of the County will increase by 7,289 persons over the period to 2012. The

implications of this have been taken into account in the broad assessment of the requirement for additional retail floorspace in the County.

5. **Income Levels:** South Tipperary did not experience the same rate of per capita income growth observed for the South East Region or the State over the period 1995 to 1999. Disposable income as a percentage of the State is also higher in neighbouring counties such as Kilkenny and North Tipperary.
6. **Retail Floorspace:** a survey of retail floorspace in the County's six main towns was carried out by DTZ Sherry FitzGerald in June 2002. Compared to other counties, it was found that South Tipperary has a higher proportion of comparison floorspace and is poorly provided for in terms of retail warehousing, although this will improve with the two developments that have recently been granted planning consent for 18,000m² (gross) retail warehousing floorspace. Clonmel dominates retailing in the County with over half of all the floorspace in the town and its environs.
7. **Shopping Patterns and Expenditure Flows:** large household and shopper surveys were carried out by Lansdowne Market Research, with the survey results mapped by GAMMA. The surveys identify current shopping patterns in South Tipperary and the relative importance of different centres. The data collected from the surveys were also used to derive estimates of expenditure flows into and out of the County, which are important considerations in determining the amount of expenditure that will be available to support additional retail floorspace over the timescale of the Strategy.
8. **Policy Framework:** the policy framework for the County Retail Strategy is set within national and local level plans, strategies and guidelines. The key national plans and strategies have been reviewed in the preparation of the Strategy and are set out in more detail in the Technical Appendix. The current and emerging Statutory Development Plans are reviewed in the Strategy, as is the County Strategy for Economic, Social and Cultural Development.
9. **Retail Trends:** a review of the main trends in retailing within the County and across the country was carried out, which identified a number of key issues, specifically:
 - A reduction in the number of small independent retailers
 - Increase concentration among fewer multiples/operators
 - Fewer shops and an increase in support service infrastructure (e.g. commercial services) in town centres
 - Smaller store formats being adopted by the larger retailers and being adapted to the high street
 - Larger supermarkets and non-food retail units
 - The emergence of new forms of retailing, including retail warehousing, retail parks, factory outlet centres (FOCs), warehouse clubs and e-retailing
 - An increasing number of discount food stores

- The important role of forecourt retailing in rural areas.
10. **Consultation:** the consultation framework for the Strategy comprised a call for comments and submissions on the Strategy in the *Nationalist*, written invitations to a number of organisations in the County to make submissions on the Strategy and a public meeting held in Clonmel in October 2002. The responses from each have been considered in the preparation of the Strategy.

BROAD ASSESSMENT OF ADDITIONAL FLOORSPACE

11. The capacity assessment is the mechanism used to estimate the amount of additional expenditure that will occur in the County over the period of the Strategy and the type and amount of additional floorspace that will be required in order to accommodate this expenditure.
12. The figures set out in the table below provide an indication as to the capacity for additional net retail floorspace in the County. These figures make allowances for any planned development of new retail outlets, turnover efficiency growth and the impact of the growth of Internet Sales.

Indicative Net Floorspace Capacity (m²)				
Period	Convenience		Comparison	
	Low	High	Low	High
2002-2006	1,400	1,500	4,800	6,100
2007-2011	2,300	2,400	11,500	13,400
Total	3,700	3,900	16,300	19,500

RETAIL DEVELOPMENT POTENTIAL

13. A review of the influencing factors at settlement level was undertaken to determine the retail potential of the main centres in the County to accommodate additional retail floorspace.
14. **Cahir:** at present, and for the foreseeable future, Cahir's role will be predominantly meeting local convenience needs. The consultations revealed no market interest in new retail floorspace. Any expansion of floorspace will be market driven and it is important that land and property is available to meet any interest that emerges, accepting that this is likely to be small scale in the context of the County's potential over the period of the Strategy. In respect of the convenience market, the lack of market interest can largely be attributed to the increasing draw of Clonmel. On the comparison floorspace front, the lack of market interest has to be put in the context of the wider economy. There is scope for the town's tourism offer to be increased and enhanced.

15. **Carrick-on-Suir:** the town has limited opportunities to meet the modern space requirements of the market. The lack of good retail floorprints may be deterring the market as there is no market interest in retail space in the town. Accepting the lack of market interest, designation of Carrick-on-Suir as a Sub-County Town Centre in the County Retail Hierarchy may serve to stimulate interest. What requires to be addressed is that, should interest emerge, there are inherent difficulties in meeting modern convenience and comparison floorspace needs within the town centre. As such, unless there is land assembly and remodelling of buildings, then edge of centre and out of centre locations will require to be looked to if the town is to grow into its role as the Sub-County Town Centre for the east of the County.
16. **Cashel:** at the time of the baseline review and assessment, market conditions in Cashel were relatively buoyant with good units being sold or let as soon as they became available. This strength is not reflected in the level of vacancies that prevail in the centre. Additionally, there is no market interest in new retail floorspace and this is attributed to the uncertainty in respect of implementation of the town bypass and its impact on the town. The bypass is looked at as having both positive and negative impacts for the town. The former require to be harnessed and the latter addressed to the benefit of the vitality and health of the town centre.
17. **Clonmel:** the preference for new retail developments should be the town centre which is consistent with the RPG and the sequential approach. This may take time to achieve given the complexities and issues that prevail with the assembly of town centre sites and a parallel strategy of edge of centre and out of centre sites may require to be considered, as has been the approach adopted in other counties through their retail strategies. One option is to enable relocation of major convenience floorspace from the town centre and create the opportunity for new comparison floorspace, particularly high order comparison goods. The approach to Clonmel over the period of the Strategy requires to take on board that retailing, whilst a key component of town centres, now has a different dimension and is part of the leisure experience, particularly in higher order centres. This is the successful route that competing centres around the country and region are taking and must be a part of a long term approach to the town if it is to sustain its role and competitiveness in the national retail hierarchy.
18. **Fethard:** there are few vacant units in the centre but this is not a reflection of market interest in the village centre. There is no interest in either existing units or developing new floorspace. For Fethard's retail offer and other village centre functions to improve will require the population of the town to increase. This will bring demand for other local services both public and private sector. These require to be located within the village centre if people are to be drawn in and visit other stores and services. A key issue however is identifying land or buildings within the village centre that would have the critical mass to attract/interest convenience operators. The alternative is edge or out of centre locations but these may not be attractive to the market due to the closeness of national and international multiples on Davis Road in Clonmel.

19. **Tipperary Town:** is a tourist centre for its large rural hinterland which includes the Glen of Aherlow and the Galtee Mountains, both of which attract numbers of visitors each year. The quality of the town's commercial leisure offer – bars, restaurants and hotels – does not fully capture this potential and it needs to see this sector enhanced if its role and importance is to be improved. The presence of Lidl is positive in terms of the market attraction of the town but currently there is little active interest in new investment in existing stock or new schemes. It appears that having a large rural catchment area is not sufficient to attract market interest. One factor that has been identified as underpinning this is the lack of a major employer in or close to Tipperary Town. There is a need for the town to improve its retail offer if it is to sustain its importance in its hinterland for convenience shopping. This is particularly pertinent given the road improvements that are pending or underway, such as the Limerick Southern Ring Road, and the relative proximity of shopping centres around the city.

STRATEGIC RESPONSE – THE COUNTY RETAIL STRATEGY

20. The **aims** of the County Retail Strategy set the framework for the **strategic** policies and **specific policies** and **proposals**. They provide a clear definition of the purpose of the Strategy and what it is intended to achieve. They are:
- **Objective 1:** To sustain and improve the retail profile and competitiveness of South Tipperary within the retail economy
 - **Objective 2:** To address leakage of retail expenditure from the County by providing the means to strengthen the range and quality of its retail offer
 - **Objective 3:** To ensure an equitable, efficient and sustainable spatial distribution of main centres across the County
 - **Objective 4:** To confirm a hierarchy which assists in achieving the County's preferred settlement strategy and objectives and provides clear guidance on where major new retail floorspace would be acceptable
 - **Objective 5:** To ensure that the retail needs of the County's residents are met as fully as possible within South Tipperary
 - **Objective 6:** To encourage and facilitate innovation and diversification in the County's retail profile and offer
 - **Objective 7:** To encourage and facilitate the re-use and regeneration of derelict land and buildings for retail uses, with due cognisance to the Sequential Test as indicated in the RPG
 - **Objective 8:** To promote and sustain the importance of retailing in the County's tourism economy
 - **Objective 9:** To provide the criteria for the assessment of retail development proposals.

Strategic Policy Framework

21. To achieve the Strategy's aims requires due cognisance to be taken of the strategic policy framework that underpins specific policy proposals. This framework is set by the retail hierarchy, the core retail areas, the sequential approach, the spatial distribution of new floorspace and the consideration of need. The **retail hierarchy** is set out as follows:
- **Tier 1 – County Town Centre:** Clonmel
 - **Tier 2 – Sub-County Town Centre:** Carrick-on-Suir and Tipperary Town
 - **Tier 3 – Town Centre:** Cahir and Cashel
 - **Tier 4 Level 1 – Large Village Centre:** Fethard
 - **Tier 4 Level 2 – Village Centre/Local Centre:** All other centres/groups of shops.
22. **Core Retail Areas:** the definition of the Core Retail Area of main centres is required by the RPG. The Strategy identifies Core Retail Areas for the main towns in the top two levels of the hierarchy – Clonmel, Carrick-on-Suir and Tipperary Town.
23. **Sequential Approach:** policies and proposals in respect of the location of retail development must be in accordance with the principles set by the sequential approach in the RPG where the priority is town centres, then edge of centre and finally out of centre locations. The Core Retail Area is thus an important determinant in the approach.
24. **Spatial Distribution of New Retail Development:** the emphasis of the Strategy is on strategic guidance on the location and scale of major retail development. It does not seek to inhibit small scale retail development in centres around the County, particularly in smaller centres. The retail hierarchy sets the framework for the spatial distribution of the quantum of convenience and comparison floorspace. Additionally, the Strategy recognises the need to ensure that local needs, primarily convenience shopping and local services, are met in an equitable, efficient and sustainable way in major existing or new residential areas in and around main settlements through the designation of locations for District or Neighbourhood Centres in development plans.
25. **Consideration of Need:** in order to sustain and improve the County's competitive position, then the Strategy must provide the policies and proposals that facilitate this. At present, set against the findings from other comparable counties' retail strategies, South Tipperary has a high level of both convenience and comparison expenditure retention. The County also has higher levels of expenditure inflows in both sectors than its comparators. The broad assessment of expenditure capacity for additional floorspace indicates that there is a need for a substantial amount of both convenience and comparison floorspace across the County, relative to the quantum of existing floorspace, particularly in respect of comparison. The assessment illustrates that

currently, the County is underprovided in retail floorspace and there is a need to redress this over the period of the Retail Strategy.

Strategic Policies

26. Strategic Policies relate to the spatial distribution of centres, their role in the hierarchy and the strategic aims of the strategy.

Summary of Strategic Policies	
Policy Reference	Policy
Policy RS1: County Town Centre – Clonmel	<i>It is the policy of the Council to promote and encourage major enhancement and expansion of retail floorspace and town centre activities in Clonmel Town Centre to sustain its competitiveness as the major centre in the County</i>
Policy RS2: Sub-County Town Centres – Carrick-on-Suir and Tipperary Town	<i>It is the policy of the Council to facilitate and encourage the consolidation and improvement of retailing and other town centre activities in Carrick-on-Suir and Tipperary Town Centres to enable enhancement and development of their roles as the key centres in the east and west of the County</i>
Policy RS3: Town Centres – Cahir and Cashel	<i>It is the policy of the Council to encourage and facilitate the consolidation of and enhancement of the retail offer and tourist attraction of Cahir and Cashel and their roles as a main centres in the County Hierarchy</i>
Policy RS4: Large Village Centre - Fethard	<i>It is the policy of the Council to facilitate and encourage the provision of shops and services that enhance the offer and attraction of Fethard better to meet the needs of the existing population</i>

General Policies

27. General Policies promote the retail planning principles that should be applied across all levels of the hierarchy.

Summary of General Policies	
Policy Reference	Policy
Policy RS5: Village and Local Centres	<i>It is the policy of the Council to retain, encourage and facilitate the retail role of village and local centres and corner shops around the County</i>
Policy RS6: Retailing in Tourism and Leisure	<i>It is the policy of the Council to encourage and facilitate the development of retailing within the tourism and leisure sectors</i>
Policy RS7: New District and Neighbourhood Centres	<i>It is the policy of the Council to encourage and facilitate the development of new District and Neighbourhood Centres to meet the needs of new and growing centres of population</i>
Policy RS8: Enhancement of Towns and Villages	<i>It is the policy of the Council to encourage and facilitate the enhancement and environmental improvement of the County's towns and villages</i>
Policy RS9: Re-Use and Regeneration of Derelict Land and Buildings	<i>It is the policy of the Council to encourage and facilitate the re-use and regeneration of derelict land and buildings</i>
Policy RS10: Innovation in the County's Retail Offer	<i>It is the policy of the Council to encourage and facilitate innovation in the County's retail offer and attraction</i>

1. INTRODUCTION

- 1.1 **DTZ PIEDA CONSULTING** in association with **DTZ Sherry FitzGerald** and **Lansdowne Market Research** was appointed in April 2002 by South Tipperary County Council to prepare the Retail Strategy for the County. The South Tipperary County Retail Strategy was adopted by the County Council on 1 September 2003 and is presented in this report.

CONTEXT FOR RETAIL STRATEGIES

- 1.2 In accordance with the '*Retail Planning Guidelines for Planning Authorities*', published by the Department of the Environment and Local Government (DoELG) in December 2000, South Tipperary County Council is required to prepare a Retail Strategy for the County (the Strategy). The guidelines were issued as Ministerial guidelines under Section 28 of the Planning and Development Act 2000. Section 28 provides that planning authorities and An Bord Pleanála shall have regard to Ministerial guidelines in the performance of their functions.
- 1.3 The Retail Planning Guidelines (RPG) were prepared in response to the increasing pressure for retail development in the last decade. They sought to provide the policy framework to enable the future development that is projected to be accommodated in a way that is '*efficient, equitable and sustainable*'.
- 1.4 The guidelines acknowledge that there is a difference between the range of issues faced by urban and rural areas. They state that it will be necessary for the more urban counties to prepare retail strategies and policies for their areas which are more detailed than in more rural areas, such as South Tipperary. The County and other rural counties are required to prepare a more general statement of strategic intentions and future policy. The matters to be addressed in the Strategy however are as for detailed strategies:
- i Confirmation of the retail hierarchy, the role of centres and the size of the main town centres;*
 - ii Definition in the development plan of the boundaries of the core shopping area of town centres;*
 - iii A broad assessment of the requirement for additional retail floorspace;*
 - iv Strategic guidance on the location and scale of retail development;*
 - v Preparation of policies and action initiatives to encourage the improvement of town centres; and*

vi *Identification of criteria for the assessment of retail developments.*

- 1.5 The RPG state that in addressing items (iii) and (iv) it should not be necessary to estimate in any detail the future requirements for additional retail development. They require a broad assessment of requirements for additional development reflecting local evidence of market interest and the need to provide good opportunities for retail provision to serve the main population centres in the County. The guidelines state that this broad assessment ought to be sufficient to formulate appropriate policies and criteria for dealing with new development proposals.
- 1.6 They recognise the challenge of policy intervention in retail development and set the following five key objectives for strategies:
- *To ensure that in future all development plans should incorporate clear policies and proposals for retail development*
 - *To facilitate a competitive and healthy environment for the retail industry of the future. The guidelines explicitly state (paragraph 23) “In interpreting these guidelines local authorities should avoid taking actions which would adversely affect competition in the retail market.”*
 - *To promote forms of retail development which are easily accessible - particularly by public transport - in a location which encourages multi-purpose shopping, business and leisure trips on the same journey*
 - *To support the continuing role of town and district centres with the former being the preferred location for retail development in view of generally better accessibility for both public transport and the private car. Where town centre locations are not available, firstly edge of centre and secondly out of centre locations should be considered with accessibility being a key criteria to be addressed. It is however recognised that town centre and edge of centre locations may not be the most appropriate for retail warehousing and the sale of bulky goods*
 - *A presumption against large retail centres located adjacent or close to existing, new or planned national roads/motorways.’*
- 1.7 The Strategy will provide the retail policies and proposals that will be incorporated in emerging development plans or as variations to development plans as appropriate. It, and the emerging policies and proposals, should:
- i Take account of the views of retailers, shoppers, property owners and transport operators;
 - ii Be based on a realistic appraisal of both expenditure change and market requirements;

iii Be based on up to date information on floorspace and shopping patterns in the area.

1.8 In addition to general policy and objectives, all new retail development in South Tipperary must have regard to the specific provisions of the RPG. Table 1.1 summarises the main provisions of the guidelines in relation to the assessment of new specialist retail development.

Table 1.1 Summary Of Provisions Of RPG In Relation To Assessing New Specialist Development	
Type Of Development	Recommendations
Regional Shopping Centres (Paragraph 68-70)	Defined as <i>out-of-town retail malls generally of 50,000m² plus (gross), typically enclosing a wide range of clothing and other comparison goods with extensive dedicated car parking.</i> Cannot be justified in the Irish context, with the possible exception of Dublin. Outside of Dublin, <i>'no justification in any circumstances'</i> due to sustainability considerations and strategic transport objectives. General presumption against large out-of-centre regional centres.
District Centres (Paragraph 71/72)	Likely to comprise in the order of 10,000m ² in or adjacent to the main towns depending on population density in the catchment area, and up to 20,000m ² within some parts of Dublin. Development Plans will identify the need for new District Centres or extensions of existing centres.
Large Foodstores (Paragraph 73-75)	Floorspace caps apply to the total net retail sales space delineated on application drawings and are as follows: Greater Dublin Area - 3,500m ² Outside the Greater Dublin Area - 3,000m ²
Discount Foodstores (Paragraph 76)	Generally have an area of approx. 1,000-1,500m ² gross floorspace. Can effectively anchor smaller centres or neighbourhood centres. Re-use of existing non-retail or vacant premises should be promoted.
Retail Parks and Retail Warehousing (Paragraph 77-84)	The special requirements of retail warehouses, due to their space extensive operations and car parking requirements, are recognised and the possibility of retail warehouse groups on the edge and outside of the town centre is accepted in principle. (para 79) Applications for individual retail warehouses outside a town centre or on its edge should be discouraged in order to reduce trip generation. A Retail Park in the range 8,000m ² to 15,000m ² is unlikely to have an adverse impact on a town centre provided that the range of goods sold is limited to truly bulky household goods or goods generally sold in bulk. The imposition of conditions to planning permissions restricting the minimum permissible unit size to not less than 700m ² is recommended. Retail warehouses in excess of 6,000m ² are unlikely to be acceptable due to local monopoly effects and their effect on the surrounding road network.
Factory Outlet Centres (Paragraph 85-88)	The potential impact on existing town centres is identified. Should be assessed having regard to the criteria set out in paragraph 65 of the RPG. Particular attention should be given to locations on the edge of town centres or where a short, high quality public transport link can be provided.
Retail Warehouse Clubs (Paragraph 89)	The RPG state that these outlets share many of the characteristics of large retail outlets and should be subject to the same policy provisions as normal retail businesses.

Table 1.1 (contd.) Summary Of Provisions Of RPG In Relation To Assessing New Specialist Development	
Shops in Small Towns and Rural Areas (Paragraph 90-92)	There is a strong presumption in the RPG in favour of maintaining and supporting local facilities in small towns and villages that provide a valuable service to the local community.
Village Shops in Rural Areas (Paragraph 93/94)	The important social and economic role of the village shop in rural areas is recognised. Such facilities should where possible be directed to existing settlements except in certain circumstances.
Local Shops (Paragraph 95)	Local shops have an important social and economic function within an urban setting. The guidelines state that these facilities should be protected through appropriate land use zoning in development plans.
Petrol Filling Stations (Paragraph 96-98)	Such shops should, in general, remain as ancillary to the main use of the site as a petrol filling station. For a shop exceeding 100m ² the development should be treated as a normal retail development and the appropriate criteria applied.

STUDY APPROACH

- 1.9 Based on our submission to prepare the Retail Strategy set against the requirements of the RPG, and as refined in consultation with Council Officers, the framework for the work was structured as follows:
- **Stage 1:** Commissioning/Inception
 - **Stage 2:** Baseline Review and Analysis
 - **Stage 3:** Capacity Assessment
 - **Stage 4:** Strategy Formulation
 - **Stage 5:** County Retail Strategy.
- 1.10 Appendix A provides a Glossary of the Terms used in the Strategy and the supporting documentation.

Stage 1: Commissioning/Inception

- 1.11 The study commenced with an **Inception Meeting** with Council Officers. This meeting served to agree the framework for the study, the different components of the approach and the consultation framework. It also enabled discussion and exploration on the key issues that currently prevailed or could do in the future.

Stage 2: Baseline Review and Analysis

- 1.12 The baseline review and analysis comprised consultations, site visits, data collection and assessment and desk based research. The components of the work are summarised below:
- 1.13 **Planning Policy and Context:** which included national and local policy; extant planning permissions; town centre/other initiatives and the existing national/County retail hierarchy.
- 1.14 **Population and Economic Context:** it was agreed that the population forecasts in the County Development Plan from the 2001 County Housing Strategy should be revised in the Retail Strategy. In the course of the work, the preliminary results of the 2002 Census of Population were published and, in accord with the Draft County Development Plan published in November 2002, these have been taken into account in capacity assessment of the requirement for additional retail floorspace. The economic context was derived from a number of reputable Government data sources and the County Development Board Strategy.
- 1.15 **Town Centre Health Checks:** it was agreed with Officers that health checks should be undertaken in the six main centres in the County. These are **Cahir, Carrick-on-Suir, Cashel, Clonmel, Fethard** and **Tipperary Town**. As all the towns did not have all the quantitative data set out in the RPG checklist, we used our modified pro forma to produce quantitative and qualitative health checks.
- 1.16 **Property Market Appraisal/Retail Trends:** an assessment of retail potential across the County and at individual centres was undertaken. This utilised local, national and international market intelligence plus our work to date on the retail trends that are set to influence the shape of retailing around the country and County.
- 1.17 **Consultation:** consultations prior to the production of the Strategy were:
- Call for comments and submissions in the *Nationalist*. Four written submissions were received. These are summarised in Appendix B.
 - Letters to a number of organisations and retailers/operators in the County to inform them about the Strategy and inviting them to make comment and/or submissions. These organisations included local economic and community development groups that were identified and agreed with Council Officers.
 - A public meeting held in Clonmel in October 2002 to report on and obtain views on the key findings of the Interim Report. This is described further below. The meeting was advertised in the local press.

- 1.18 **Floorspace Survey:** the net retail floorspace was recorded for all retail properties under the categories of convenience, comparison, bulky goods and vacant retail space. It was agreed that the survey would cover the six main centres identified above.
- 1.19 **Household and Shopper Surveys:** household surveys enable the shopping patterns of residents to be determined, of particular importance are the flows to centres within the County and the outflows to competing centres such as Kilkenny and Waterford cities. Shopper surveys add to the information on resident's shopping patterns but also provide information on inflows of spend by both tourists and residents of neighbouring counties. Both surveys provide key information on expenditure retention and leakage and hence provide vital information in estimating the retail expenditure potential of the County. The surveys comprised:
- **Household Survey:** some **500** households in the County were interviewed by telephone surveys in June 2002
 - **Shopper Surveys:** these were undertaken in the six centres during June/July 2002. They were by face to face interviews and a total of **506** were completed. The interviews were distributed as follows: Clonmel (**253**); Carrick-on-Suir (**52**); Tipperary Town (**52**); Cashel (**52**); Cahir (**49**) and Fethard (**48**).

Stage 3: Capacity Assessment

- 1.20 The capacity assessment identifies the potential expenditure and the additional retail floorspace in South Tipperary over the Strategy period. This period is in the first instance to 2006 in order to be broadly consistent with the County Development Plan and then to 2011.

Stage 4: Strategy Formulation

- 1.21 The findings from the above stages of the work were compiled in an **Interim Report** which set out the key information and analysis underpinning the County Retail Strategy. As noted above, a public meeting was held to present the key findings of the Interim Report in October 2002. The purpose of the meeting was to gain the preliminary views of Members of the County and Town Councils, local retailers and businesses and members of the public on the findings to enable issues and opportunities to be discussed and considered.
- 1.22 The previous stages of the work and the public consultation provide the foundations for the Strategy. From this the work moved onto strategy formulation. This work comprised:

- i Setting the baseline framework/foundations for the Strategy;
- ii Assessment of the retail hierarchy;
- iii Assessment of the retail potential; and
- iv Identification of policies and initiatives to secure town centre and other centre enhancement.

It should be highlighted that the brief set by the Council required that retail potential be identified at a centre/settlement level and not at the site specific level.

- 1.23 The output of this stage of the study was the **Draft Final Report** which incorporates the above elements and formed the basis of this document the **County Retail Strategy**.

Stage 5: County Retail Strategy

- 1.24 Following agreement on the Draft Retail Strategy, the **Draft County Retail Strategy** was prepared. This was put on public display from 24 May until 1 July 2003 and the submissions and observations received were taken into account in the Manager's Report proposing adoption of the Strategy. **The South Tipperary County Retail Strategy** is supported by a **Technical Appendix** which is based on the study Interim Report. This document provides the baseline reviews and assessments that underpin the Strategy.

THIS REPORT

- 1.25 This report is the **County Retail Strategy** which was adopted by South Tipperary County Council on 1 September 2003. The Strategy will form part of the new County Development Plan, when adopted. In addition, it will be presented to the Town Councils of Cashel, Carrick-on-Suir and Tipperary Town for adoption as part of their respective development plans to ensure consistency with the County Development Plan.

- 1.26 The remainder of the report is as follows:

Section 2: presents the key baseline facts and analysis

Section 3: provides the capacity assessment of the potential for further retail floorspace in the County

Section 4: reviews and assesses the retail hierarchy for the County and the role that key centres do and should play

Section 5: summarises the key issues and considerations in relation to the retail potential of the main centres in the County and their implications for the County Retail Strategy

Section 6: outlines the aims, strategic framework and policies and proposals of the County Retail Strategy.

2. BASELINE FOR THE STRATEGY

- 2.1 As has been highlighted in Section 1, the detail of the baseline information that is specific to this Strategy is contained in the separate Technical Appendix to this report. In this section, we focus on the key facts and information that underpin the development of the County Retail Strategy. These are examined under the following:
- i Population levels and forecasts;
 - ii Income levels;
 - iii The extent and distribution of retail floorspace;
 - iv Shopping patterns and expenditure flows;
 - v Policy framework;
 - vi Retail trends; and
 - vii Consultations.
- 2.2 From our work on other retail strategies around the country, we have a wealth of comparator information on each of the above. This is introduced to our analysis as appropriate as it serves to highlight the strengths and weaknesses of the County and its centres that require to be harnessed and addressed respectively.

POPULATION LEVELS AND FORECASTS

- 2.3 In the later stages of the preparation of the County Retail Strategy, the preliminary results from the April 2002 Census of Population were published. These are not adopted results and do not provide the full and detailed results from the Census. The full results will not be available until 2004. In addition to the Census, the National Spatial Strategy (NSS) was published in the final months of 2002. This too will have a bearing on the population data and forecasts. Following the publication of the full results of the Census and the NSS, there will have to be comprehensive reviews of the population data underpinning development plans and other strategies of councils around the country.
- 2.4 Noting the above, the Draft County Development Plan which was published in November 2002 has incorporated the preliminary results of the Census at the County level and, as such, for consistency this information is taken account of in the capacity exercise on the potential for additional retail floorspace that follows in Section 3. Additionally, the preliminary results of the Census provide valuable insights into how

the County and its different centres have performed in terms of population trends since 1996. Where it has been possible, we have used the results to inform our analysis and the formulation of the Strategy.

- 2.5 At the time of the previous Census in 1996, the population of South Tipperary was 75,514 which represented a slight increase in population of 0.8% since 1991. This was lower than that for the State as a whole which was 2.8% over the same period.
- 2.6 As Table 2.1 confirms, Clonmel and its Environs is by far the largest centre in the County. Between 1991-1996, only Clonmel (4.3%) and Cahir (8.8%) had population growth rates above the national average. The other centres illustrated the following trends: Tipperary Town (-2.2%), Cashel (-4.5%), Carrick-on-Suir (<1%) and Fethard (2.6%).

Table 2.1		
Comparison of the Population of the Main Centres – 1991 and 1996		
Area	1991	1996
Clonmel & Environs	14,949	15,586
Tipperary & Environs	4,963	4,854
Cashel & Environs	2,814	2,687
Carrick-on-Suir	5,163	5,172
Cahir	2,055	2,236
Fethard & Environs	1,431	1,397
Source: 1996 Census of Population, CSO		

- 2.7 While the absolute future level of population is of significance, in the context of the Retail Strategy we are primarily interested in the expected growth in population and, in particular, where this growth is located. The population forecasts used in the Retail Strategy are based on those contained in the South Tipperary Draft County Development Plan 2002, which in turn are derived from the County Housing Strategy.
- 2.8 The preliminary results from the 2002 Census of Population show that South Tipperary had a population of 79,213 in 2002, an increase of 3,699 and 4.9% over the period since 1996. The County Housing Strategy predicts that the population of South Tipperary will increase by 4.5% between 2002 and 2007 and the Draft County Development Plan assumes that the period 2007 to 2012 will experience the same rate of growth. This implies that the population of South Tipperary will increase to 82,777 by 2007 and 86,502 by 2012, resulting in an additional 7,289 people living in the County over the ten-year period. This has been taken into account in the capacity exercise.

- 2.9 The County has of the same order of population as neighbouring Kilkenny but is larger than North Tipperary. Clonmel (and Environs) as the main centre in South Tipperary, at 1996 was smaller than the comparable county towns of Kilkenny City (18,695) and Ennis (17,726) but is much larger than either Nenagh (5,913) or Thurles (6,939). This position remains the case, based on the preliminary results of the 2002 Census.
- 2.10 Using the preliminary results from the 2002 Census, it has been possible to provide estimates of the population of the main centres. These have been derived using the population figures for the main district electoral divisions (DEDs) located in and around each of the centres. Table 2.2 sets out the estimates. It should be noted that in most cases the combined DEDs for each centre comprise a larger area than the actual town boundary and therefore the figures in Tables 2.1 and 2.2 for 1996 are not comparable. However, as we have highlighted above, the figures do assist in the understanding of how the different centres have performed over a period of unprecedented growth nationally.

Table 2.2			
Comparison of the Population of the Main Centres: 1996 and 2002			
Area	DEDs	1996	2002
Clonmel & Environs	Clonmel Urban, Clonmel Rural, Inishlounaght, Kilmacomma and St Mary's	18,424	18,898
Tipperary & Environs	Tipperary Urban and Tipperary Rural	6,152	6,207
Cashel & Environs	Cashel Urban and Cashel Rural	3,672	3,861
Carrick-on-Suir	Carrickbeg Urban and Carrick-on-Suir Urban	5,172	5,542
Cahir	Kilcommon, Caher and Mortlestown	3,552	4,124
Fethard & Environs	Fethard and Peppardstown	2,044	2,127
Source: 2002 Censuses of Population, CSO			

- 2.11 The table illustrates that there have been varying levels of growth across the main centres in the County. Noting that the County's figure based on the preliminary estimates from the 2002 Census is 4.9%, the following is found for each of the centres with the figure for the earlier period of 1991-96 provided in brackets:

- Clonmel 2.5% (4.3%)
- Tipperary Town <1% (-2.2%)
- Cashel 5.1% (-4.5%)

- Carrick-on-Suir 7.1% (<1%)
- Cahir 16.1% (8.8%)
- Fethard 4.1% (2.6%)

2.12 On the basis of these figures and statistics, the following can be observed in respect of each of the main centres in the County:

- i Clonmel has witnessed a decrease in its growth rates since 1996 and is below the County average;
- ii Tipperary Town has changed from a position of population decline to that of a low increase;
- iii Cashel has enjoyed a reversal from population decline to growth levels above that of the County as a whole;
- iv Carrick-on-Suir has changed from almost an almost static population to a growth level that is well over that of the County's;
- v Cahir was the fastest growing centre at 1996 and the percentage growth has almost doubled in the intervening period; and
- vi Fethard is seen to be a growing population centre over the period since 1991 with the rate improving between then and 2002 which contrasts with the view that it is a declining centre. However, it is likely that the figures mask the relative decline within the village/town's boundaries against the greater growth in the environs.

INCOME LEVELS

2.13 As set out in Table 2.3, while the per capita disposable income in South Tipperary increased between 1995 and 1999, the County did not achieve the same growth rates as that of its Region or State. In fact the proportion of South Tipperary's per capita disposable income actually fell from 89.7% to 84% relative to that of the State between 1995 and 1999. This is mainly due to the high growth in incomes achieved in the Greater Dublin Area(GDA).

Table 2.3						
Per Capita Disposable Income 1995 – 1999						
Disposable Income	Euro					% increase 1995 – 1999
	1995	1996	1997	1998	1999	
State	9,032	9,709	10,716	11,785	13,146	46%
Southern & Eastern	9,326	10,027	11,051	12,212	13,687	47%
South East	8,250	8,805	9,544	10,550	11,560	40%
South Tipperary	8,099	8,703	9,339	10,303	11,048	36%
Source: Derived from CSO, 2000						

RETAIL FLOORSPACE

- 2.14 The retail floorspace survey of the County's main centres was carried out in June 2002 by our sister company **DTZ Sherry FitzGerald**. The six main centres and the details of their floorspace are set out in Table 2.4. The survey did not include new retail developments that were planned for or under construction at the time of the survey. These are accounted for in Section 3.

Table 2.4									
Composition of Retail Floorspace 2002 (m² net)									
Location	Vacant (m²)	%	Convenience (m²)	%	Comparison (m²)	%	Retail Warehousing (m²)	%	Total (m²)
Clonmel	1,401	4.4	10,378	32.9	18,722	59.3	1,050	3.3	31,552
Tipperary Town	857	7.3	4,595	39.1	5,249	44.6	1,062	9	11,764
Carrick- on-Suir	451	6.4	2,668	37.9	3,609	51.3	312	4.4	7,040
Cahir	95	1.9	1,207	24.4	3,647	73.7	0	0	4,949
Cashel	419	9.1	2,114	46.1	1,573	34.3	480	10.5	4,586
Fethard	24	1.8	524	39.4	784	58.9	0	0	1,331
Total	3,247	5.3	21,486	35.1	33,584	54.9	2,904	4.7	61,222
Source: DTZ Sherry FitzGerald Floorspace Surveys June 2002									

- 2.15 The table illustrates that the main centres in the County had a total retail floorspace of **61,222m²**. It is valuable to compare this with neighbouring or nearby counties where we have also prepared retail strategies as this provides an insight to the County's competitiveness. From this information, it is found that South Tipperary has more retail floorspace than Clare (47,934m²), Kilkenny (59,856m²) and North Tipperary (51,505m²). It has a higher proportion of convenience floorspace than Clare (26.5%) or Kilkenny (19.9%) but of the same order as North Tipperary (37.9%). Against Clare (8,649m²) and Kilkenny (6,943m²), South Tipperary is poorly provided for in

terms of retail warehousing space. Existing provision is comparable to North Tipperary (2,059m²). The County's relative position will significantly improve with the two retail warehousing developments that have recently been granted planning consent for 18,000m² (gross) of floorspace. However, both Clare and North Tipperary also have plans to see retail warehousing space improve and there is considerable market interest in the Kilkenny City Environs. This illustrates the competitiveness of this sector of the market.

- 2.16 From Table 2.4, it is clear that Clonmel dominates retailing in South Tipperary with over half of all of the County's floorspace (51.5%) in the town and its environs. It is followed in descending order by Tipperary Town (18.9%), Carrick-on-Suir (11.5%), Cahir (8.1%), Cashel (7.5%) and then Fethard (2.2%). Clonmel, as the County Town, however has a smaller amount and proportion of the total floorspace in the County than its comparators of Ennis (35,552m² – 75%) or Kilkenny (50,667m² – 85%) but much larger levels than either Nenagh and Thurles. Clonmel's share will increase with the pending retail warehousing schemes but equally both Ennis and Kilkenny are set to significantly enhance the level, range and quality of their floorspace. In respect of the latter in particular, this could have implications for expenditure leakage and the competitive position of the County. To this of course must be added the improving attraction and strength of nearby Waterford City for shopping and the market interest in the city and its environs for additional floorspace.
- 2.17 With the exception of Cashel, all of the other main centres in the County have more comparison (including where appropriate retail warehousing) than convenience floorspace. For centres of their size, except where tourism is important, then the reverse would be expected. The lower levels of convenience floorspace partly explain the high dependence on Clonmel for food shopping. In the case of Cahir the picture is skewed because of the dominance of one comparison retailer – Fluerys Antiques which accounted for 1,590m² some 32% of all the town's floorspace and over 43% of its comparison floorspace. The table illustrates that Fethard is a very small retail centre with limited floorspace which meets neither convenience or comparison needs.
- 2.18 Vacancies are below 8% for all centres except for Cashel but at 9.1% it is still not of a level that should cause concern. Clonmel's vacancy rate is low at 4.4% which is of the order of that in Ennis, Kilkenny City, Nenagh and Thurles. This reflects the strength and vitality of the County Town.

SHOPPING PATTERNS AND EXPENDITURE FLOWS

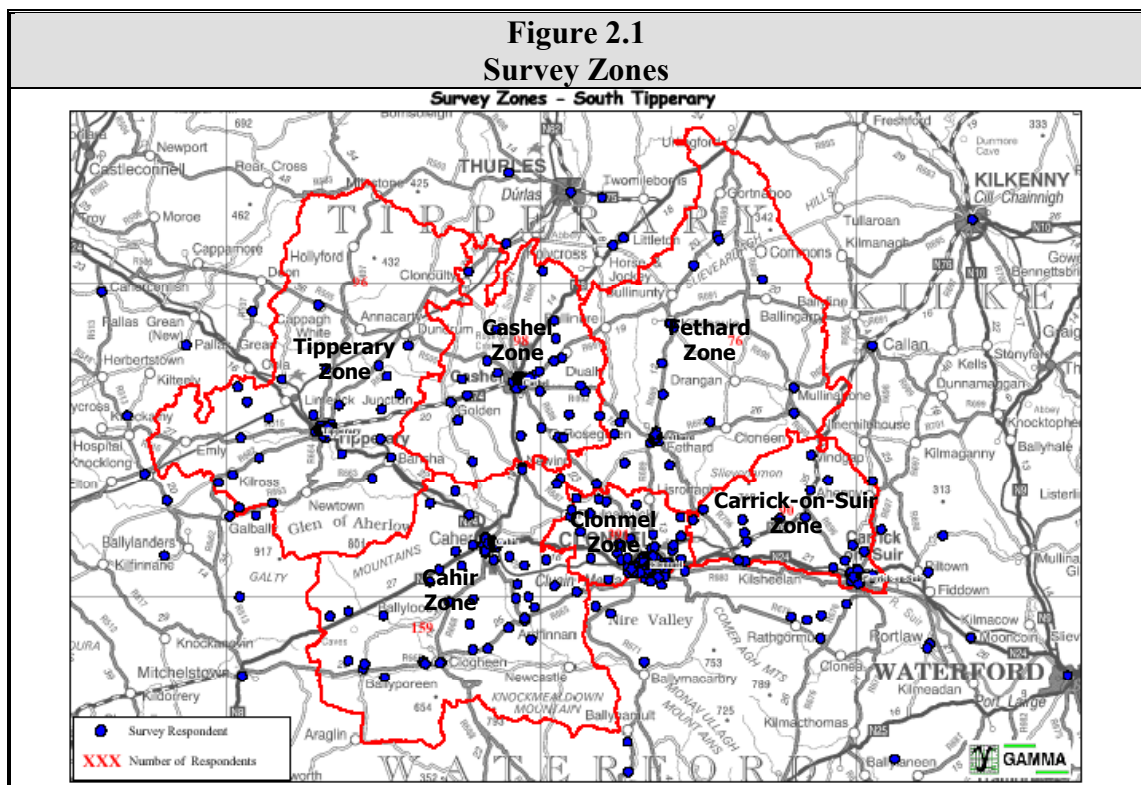
- 2.19 Comprehensive household and shopper surveys were conducted as part of the study. They were carried out by **Lansdowne Market Research** with the survey results mapped by **GAMMA**. The objective of the surveys was to identify current shopping patterns in South Tipperary and the relative importance of the different centres in the County. The surveys also play an important role in the capacity assessment in

informing our estimates of **market share** (the proportion of retail expenditure by persons living in South Tipperary spent and retained in the County) and **trade draw** (the proportion of turnover in retail outlets in South Tipperary attributable to persons living outside the County). Detailed analysis of the household and shopper surveys are contained in the Technical Appendix and this has been taken into account in the preparation of the Strategy. Below we highlight some of the key findings that emerged under the following headings:

- Catchment Areas
- Expenditure Flows
- Mode of Travel.

Catchment Areas

2.20 The overall objective of the household survey is to provide an insight into the shopping patterns of the **resident** population of the County. Some **500** telephone interviews were undertaken in June 2002. These were randomly selected and provided a good geographical coverage of households in the County. This is illustrated in Figure 2.1.



2.21 Nearly half (246) of the respondents in the household survey came from the Clonmel Zone. The remainder were spread in the other zones as follows: 76 (15%) came from

the Cahir Zone; 56 (11%) from the Cashel Zone; 47 (9%) from both the Carrick-on-Suir and Tipperary Town Zones; and, 17 (3%) from the Fethard Zone. In some instances it was not possible to accurately ‘geo-code’ some of the respondent’s locations and 11 respondents came into this category. They are, however, assumed to be located somewhere within South Tipperary and are therefore included as part of the analysis.

2.22 The surveys reveal that the County is retaining almost all of its food shopping with only 1.6% and 0.8% of residents doing their main food and top up shopping in other counties. There is however leakage of expenditure for both bulky goods and clothing and footwear as follows:

- i 16.3% of residents are doing their bulky goods shopping outside of the County. This is to Waterford (7.1%), Limerick (2.9%), Kilkenny (2.1%) and Cork (1.5%); and
- ii 21.9% of residents are doing their clothing and footwear shopping outside of the County. This is to Waterford (7.4%), Limerick (4.7%), Cork (4.3%) and Kilkenny (1.4%).

2.23 Table 2.5 sets out the origin and destination of shoppers in South Tipperary and where they do their shopping by shopping type. This is founded on 506 on street face to face interviews in the six main centres. The distribution of interviews was: Clonmel (253); Carrick-on-Suir (52); Tipperary Town (52); Cashel (52); Cahir (49); and, Fethard (48).

Table 2.5 Catchment Area for Shopping in the Main Centres (% of respondents in each centre)							
Origin	Cahir	Carrick-on-Suir	Cashel	Clonmel	Fethard	Tipperary Town	South Tipperary
Live in Town	71.4	55.8	48.1	48.2	89.6	32.7	53.6
Live outside the Town but in the County	16.3	9.6	36.5	24.9	10.4	40.4	23.9
North Tipperary	10.2	7.7	1.9	20.9	0	0	12.5
The rest of the Republic of Ireland	0	23.1	11.5	4.3	0	26.9	8.5
United Kingdom	0	3.8	0	0.4	0	0	0.6
Europe other than UK and Ireland	0	0	1.9	0.4	0	0	0.4
Other	2	0		0.8	0	0	0.6
Total	100	100	100	100	100	100	100

2.24 The key points from this table are:

- Clonmel is clearly the main shopping destination for South Tipperary residents for all categories of shopping across all the zones.
- After Clonmel, the most popular destination was Tipperary Town for main food and bulky goods with 8.4% and 5.8% shopping there respectively.
- Cashel and Carrick-on-Suir have both only 6.1% of residents doing their main food shopping there, which suggests that these towns serve relatively local catchments areas.
- All of the zones, barring those of Cahir and Fethard, are retaining the majority of their main food shopping. For both Cahir and Fethard, it is mainly leaking to Clonmel.
- All zones are retaining their top up shopping trade.
- Except for Clonmel, none of the zones are retaining either their bulky goods or clothing and footwear shopping expenditure. For Cahir, Fethard and to a lesser extent Cashel, this leakage is to Clonmel. However, for both the Carrick-on-Suir and Tipperary Town Zones there is higher leakage out of the County.

2.25 From the table, it can be seen that over 22% of those interviewed came from outside of the County. The majority of these were from North Tipperary. It is evident that Cahir and Fethard almost exclusively serve their immediate towns. Clonmel serves a wide area that includes all of South Tipperary. However, only a small proportion of people interviewed there were from outside of the County. Given their relative peripheral locations within the County, it is not surprising that Carrick-on-Suir and Tipperary Town serve wide catchments which also include areas outside of South Tipperary. Cashel serves its rural hinterland but importantly some 12% of people interviewed in the shopper survey came from outside of the County. This may be due to its location on the N8, the Primary Route connecting Dublin and Cork, and its role as a visitor destination.

Expenditure Flows

2.26 South Tipperary has high net inflows of both convenience and comparison expenditure. Table 2.6 illustrates how exceptional this is by setting the figures against those of other counties where we have prepared retail strategies. The differences can to a degree be attributed to the timing of the South Tipperary surveys. They were undertaken in June whilst the others were conducted in autumn and winter which are not important visitor months as a whole. The figures for the County will be examined in further detail in the capacity exercise that follows.

Table 2.6 Comparison of Expenditure Flows				
County	Inflow (%)		Outflow (%)	
	Convenience	Comparison	Convenience	Comparison
South Tipperary	20.6	44.1	1.9	15.1
Clare	10	25	21.3	41.6
North Tipperary	13.1	19.2	12.4	30.2
Donegal	7.6	16.6	5.5	26.0
Kilkenny	6.3	28.8	14.2	18.0
Meath	10.0	14.0	6.8	58.0
Wicklow	24.0	4.0	2	40.0
Source: DTZ Piedad Consulting Research 2002				

Mode of Travel

- 2.27 The main mode of transport used by shoppers interviewed is set out in Table 2.7. The table illustrates that overall the main mode was the car (56% of all respondents). There were differences between the different centres as shown by the highest level of 71% in Carrick-on-Suir through to the lowest level of 43% in Cahir. Public transport (bus) only accounted for a small proportion of respondents as follows: Clonmel (6.3%); Cahir (4.1%); and, Tipperary Town (5.8%). The low public transport figures reflect the rural nature of the County and the high dependency on the car. The numbers that walked to the centre is particularly high in both Cahir (53.1%) and Fethard (52.1%) and this serves to confirm that both serve relatively local catchments.

Table 2.7 Main Mode of Transport (%)							
	Cashel	Clonmel	Cahir	Carrick on Suir	Fethard	Tipperary Town	Average
Car	53.9	68.8	42.8	71.2	47.9	52	56.1
Walk	42.3	23.7	53.1	25	52.1	36.5	38.8
Bus	0	6.3	4.1	0	0	5.8	2.7
Bicycle	0	0.8	0	0	0	0	0.1
Motorbike	0	0	0	0	0	1.9	0.3
Other	3.8	0.4	0	3.8	0	3.8	2
Total	100	100	100	100	100	100	100

POLICY FRAMEWORK

- 2.28 The policy framework for the County Retail Strategy is set within national and local level plans, strategies and guidelines.

National Plans, Strategies & Guidelines

- 2.29 There are a number of national level plans, strategies and guidelines that are of particular relevance to the shape of the County's Retail Strategy and the direction that it takes. These are:

- i National Development Plan (NDP);
- ii National Spatial Strategy (NSS);
- iii Sustainable Development: A Strategy for Ireland;
- iv Ensuring the Future – A Strategy for Rural Development in Ireland; and
- v Retail Planning Guidelines for Local Authorities (RPG).

- 2.30 All of these plan/strategies have been reviewed in the preparation of this Strategy and summary reviews are provided in the Technical Appendix. In terms of the framework for the Retail Strategy, the most important national policy influence are the RPG. The key requirements of the guidelines are summarised in Section 1 and the framework provided by the national retail hierarchy for the County Retail Strategy is addressed in Section 4.

Local Plans and Strategies

- 2.31 The key plans and strategies at the County level that require to be considered in the preparation of the County Retail Strategy are:

- Statutory Development Plans
- County Strategy for Economic, Social and Cultural Development.

Statutory Development Plans

- 2.32 The current and emerging development plans covering the County are:

- i South Tipperary County **Draft** Development Plan (2002);

- ii Cahir Development Plan (1999);
- iii Carrick-on-Suir **Draft** Development Plan (2001);
- iv Cashel **Draft** Development Plan (2002);
- v Clonmel Development Plan (2002);
- vi Clonmel Environs Development Plan (2000);
- vii Fethard Development Plan (1999); and
- viii Tipperary Town **Draft** Development Plan (2002).

2.33 The relevant policies in the Draft County Development Plan are examined as part of the appraisal of the retail hierarchy in Section 4. The Cashel and Tipperary Town development plans are currently being prepared and will be available shortly. As this will result in the adopted plans for these areas being superseded then, with the exception of the Draft County Development Plan, these plans were not reviewed as part of the examination of the influences on the Retail Strategy.

2.34 Many of the development plans in South Tipperary were prepared after the draft and final publication of the RPG. Therefore, a number of the plans specifically state that the principles and policies set out in the guidelines will be adhered to. It should be noted that there is no **retail** hierarchy set down in the adopted and emerging development plans. In the adopted plans, there is a strong policy emphasis on the consolidation of retailing activity in the town centres. Table 2.7 summarises the key policies that are of direct relevance to retail planning in the County and its main centres and as such have been taken into account in the preparation of the Strategy.

Table 2.7	
Priorities as in the Statutory and Emerging Development Plans in the County	
Policies and Priorities	Settlements
Enhance the Vitality and Viability of Town Centres	
To strengthen the town centre as a commercial, cultural and living centre. In particular, only developments in the outer zones that will enhance the town centre rather than detract from it will be allowed.	Cahir, Fethard and Carrick-on- Suir
The proposals, either by itself, or cumulatively with other such proposals should not have a significant detrimental impact on the vitality and viability of the town centre	Clonmel, Carrick-on-Suir and Clonmel Environs
It is a policy of Clonmel Borough Council to promote and reinforce O’Connell Street, Gladstone Street, Mitchell Street and Market Place as the primary shopping area and to protect the retail function of the Central Area.	Clonmel
Prevention of the conversion of existing ground floor retail units to non-retail uses within the primary shopping area. In new developments within this area, retail use will be required on the ground floor	Clonmel and Carrick-on-Suir
Large Scale Development	
<ol style="list-style-type: none"> 1. All new retail development must be assessed using the “sequential approach” as well as their traffic generation implications 2. Encourage the process of site assembly for larger retail development and encourage national chain retail branches and retail departmental stores to locate to the town to act as an anchor unit to attract further retail development 	Clonmel
Sites Identified in Town Centre for Development	
<ol style="list-style-type: none"> 1. Mill Building, Castle Street 2. Former School Sites in Church and Mary Streets 	Cahir
Seeks the appropriate reuse/redevelopment of the sites set out in the Development Plan. Development will be in accordance with the zoning and/or guidelines set out in the Development Plan	Carrick-on-Suir
Relevant Town Centre Objectives	
Prepare action plan for the town centre in conjunction with Phase II of the proposed environmental improvements	Cahir
<ol style="list-style-type: none"> 1. Prepare an action plan in convert with the bypass proposal, to include traffic calming, parking improvements and environment improvements. 2. Design environmental improvements scheme for Castle and Kickham Streets. 3. Improve shops fronts and streetscapes taking enforcement action where necessary to achieve compliance. 	Carrick-on-Suir
Out of Centre Area	
<ol style="list-style-type: none"> 1. In principle large out of Central Area retail centres are restricted in order to protect the vitality and viability of the town centre. 2. Applications for out of Central Area retail developments have to demonstrate their impact on the Central Area vitality and viability. 	Clonmel
Village Shops/Corner Shops	
Encouragement of proposals for the provision of local shops within villages, particularly in connection with new residential development	Clonmel Environs

County Strategy for Economic, Social and Cultural Development

2.35 During the preparation of the Retail Strategy, the County Development Board's (CDB) '*South Tipperary County Strategy for Economic, Social and Cultural Development*' was published. This sets out four programmes for the County:

- i Economic;
- ii Social;
- iii Cultural; and
- iv Local Agenda 21.

All of these to different degrees have relevance to the Strategy. However, the two that are most important are the Economic and the Local Agenda 21 programmes.

2.36 Whilst it does not set out a settlement strategy or hierarchy as such, the CBD strategy identifies in its Economic Programme:

'South Tipperary can be divided into two economic zones. The region dominated by Clonmel, including Carrick-on-Suir, Fethard, Cashel and Cahir, has been successful in creating and sustaining jobs. The second economic zone includes those areas distant from Clonmel, such as West Tipperary and Slieve Ardagh, that have not been competitive in creating and sustaining jobs and where there is a shortage of employment opportunities.'

and, the following which is one of the CDB Strategy's main objectives:

'Strive towards achieving balanced development in the County.'

2.37 These both must be taken due account of in the preparation of the County Retail Strategy and the formulation of the County Retail Hierarchy. In respect of the Local Agenda 21 Programme, ten main objectives are promoted. Those that are of greatest relevance to the Retail Strategy are:

- *Promote sustainable development and plan a strategy that links facility development, infrastructure and provision of the requisite level of services at household, village, small town, county town and region.*
- *Include the community sector as an equal partner when developing public policies and responses.*
- *Promote sustainable transport solutions (for both rural areas and between/within the main towns).*

- *Identify priorities for public and private investments.*

RETAIL TRENDS

- 2.38 Ireland has for most of the last decade witnessed unprecedented rates of economic growth. Retail sales in the country grew by a staggering 60%¹ during the period 1990-1996. They grew by a further 42% between 1996 and 2000. This growth has been manifested in the retail sector through increased floorspace and increased volume rates of growth. It has also brought with it emerging trends and new forms of retailing not previously present in our retail market. Outlined below is a summary of the key emerging trends and the position in respect of each within the County.
- 2.39 **Reduction in the Number of Small Independent Retailers:** this has been the trend across the country and one that is set to continue. 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. While it is anticipated there will be further decline in the number of independents, they still form a significantly high proportion of the shops in the South Tipperary centres. This is confirmed by our analysis which indicates that they represent between 60% – 81% of shops in the main centres of the County. Clonmel has the lowest proportion of independents at 60% of outlets with multiples 38%. This is high against comparable centres such as Ennis or Thurles. There are however almost no multiples in any of the County's other towns with the independently owned symbol stores dominating the convenience sector. Also important in towns such as Cahir and Cashel are the Co-ops which are important suppliers of hardware and DIY goods.
- 2.40 **Increased Concentration Among Fewer Multiples/Operators:** there is clear evidence that this is happening throughout the County for main food shopping. From the household survey, 68% all main food shopping was either at Dunnes Stores (30%), Superquinn (28%) or Tesco (10%). The bulk of the remainder of main food shopping is undertaken in SuperValu which has on the whole the largest format of the symbol groups. The high level of main food shopping in SuperValu stores reflects its representation in all of the County's main centres apart from Fethard.
- 2.41 **Fewer Shops:** in general there has been a decrease in the number of convenience and an increase in comparison retail units around the country. There is however evidence in many towns that mainstream retail uses are changing to supporting service infrastructure such as financial and business services, restaurants, cafes, bars and sandwich shops, depending on the size of the centre. In the main, this tends to improve the ambience of centres, their attraction to visitors and generally improves the centre's vitality and viability. However, some sectors of local and business communities see this trend as evidence of the decline of retailing in town centres.

¹ *Forfás and Goodbody Report*

This has to be put in the context of the changing needs, demands and roles of key centres. The RPG confirm that this range is what town centres should comprise *‘a broad range of facilities and services which function as a focus for both the community and public transport.’*

- 2.42 **Small Store Formats:** these are smaller units developed by the larger convenience operators and adapted to be more suitable to the high street. There are no examples of this in South Tipperary and only a limited number elsewhere. However, there may be scope for this format in centres of the size of Clonmel based on market interest in similar sized towns and as illustrated by the one recently opened in Kilkenny City Centre by Dunnes.
- 2.43 **Larger Supermarkets and Non-Food Retail Units:** in respect of large supermarkets/superstores, the RPG have placed a cap on the net convenience floorspace size of such stores at 3,000m² throughout the country, with the exception of the Dublin/GDA area where it is 3,500m². The non-food component of larger supermarkets/superstores is taken as additional to this. It can be anticipated that the larger multiple and symbol group operators will seek to enhance and improve their retail offer and presence in the County over the timescale of the Strategy. Noting this, to date the cap is well below the average size of stores that have been developed/are operating in the County. The hypermarket format of operation which involves food and non food co-located together under the one roof is new to Ireland. Tesco has however recently received planning consent a hypermarket in North Dublin. Given the critical mass of population normally required for such a store, market interest is likely to be limited but it cannot be ruled out as a potential option.
- 2.44 **The Emergence of New Forms of Retailing:** these include retail warehousing, retail parks, factory outlet centres(FOCs), warehouse clubs and e-retailing. These new forms have different locational requirements to the more conventional retail formats and therefore will have a different distribution to the traditional high street shops:
- i Retail warehousing is relatively underprovided for in the County accounting for less than 5% of total floorspace. However, as has been noted, the recently approved schemes at Clonmel will add 18,000m² (gross) to total retail warehousing floorspace in South Tipperary which represents a sixfold increase on what is there at present;
 - ii There has been an increasing demand for very large standalone retail units, predominantly from the DIY sector although there are other specialist ‘concept’ furniture retailers. The full potential of this sector of the retail market when compared to trends in the rest of Europe is at present limited by the RPG caps. This issue is currently focus of a review of the RPG;
 - iii There are no FOCs in the Region and in fact there are only two operating in Ireland at present – Killarney and Rathdowney. In contrast to the experience in the UK, these centres have not performed as well as their anticipated

potential. It is unlikely that there will be development of new FOCs until the existing outlets are trading well, however given the proximity of Rathdowney to South Tipperary there is unlikely to be scope for another FOC in the general area/region;

- iv Warehouse clubs or discount clubs have not yet become a feature of retailing in Ireland. As stated in the RPG, these combine elements of cash and carry wholesaling with sales to qualifying members of the public. While promoted as a specialist form of retailing, they should be treated as retail businesses and assessed as such under the requirements of the RPG;
- v The uptake of e-retailing is not high in South Tipperary. The household survey found that overall 7% of those surveyed had used the internet to shop in the last six months. Other areas such as in the Mid West Region were found to have higher numbers using this medium for shopping and other purchases. Internet retailing in Ireland is still in its infancy and it may not grow to be a major part of future shopping trends. This is because:
 - It is largely prevalent in areas of high concentrations of population. Experience from the UK indicates it is found largely around the English conurbations with little market penetration in Scotland or Wales.
 - There is little tradition of 'other' forms of retailing in Ireland, such as mail order.

2.45 **Discount Food Stores:** are a relatively new form of convenience retailing that is being predominantly expanded by major European operators. The RPG identifies discount stores as having different characteristics to mainstream superstores and supermarkets and as such different trade draw patterns. Additionally, they are seen as a format that has a potential role in extending the choice and range of retailing particularly for certain sectors of the community. There are already two Lidl GMBH stores in Clonmel and Tipperary Town and Aldi has recently received planning permission for a store in the former. It is a sector that can be anticipated to seek expansion in the County over the period of the Retail Strategy.

2.46 **Petrol Filling Stations:** as recognised in the RPG, forecourt retailing has an important role as the local shop and supermarket in rural areas and this has been confirmed by our research. In many villages, it is in fact now often the only retail outlet. There will be continuing pressure for further forecourt retailing as this often aids the viability of the petrol filling station business in rural areas. The RPG do not seek to prevent this but set out the considerations that require to be taken into account in determining planning applications.

2.47 To improve competitiveness, help retain resident's expenditure and attract visitors and tourists from outside of South Tipperary, the County's centres must provide a modern shopping offer that captures these trends and innovations in retailing. This will have

an influence on shopping patterns and the nature of these patterns. The degree to which this will affect the County and its towns and villages will depend on a mix of factors. The market is of course very important but the policy framework which is set by the County Retail Strategy **should** be the determining foundation for decision making and future development. This policy framework is greatly influenced by the specific provisions of the RPG(including floorspace caps). The objective of South Tipperary County Retail Strategy must be to assist in understanding and implementation of the RPG within the County.

CONSULTATIONS

2.48 As detailed in Section 1, the consultation framework for the Strategy comprised the following:

- Call for comments and submissions in the Nationalist
- Letters to a number of interested organisations in the County to inform them about the Strategy and inviting them to make comment and/or a submission
- The public meeting held in Clonmel in October 2002.

2.49 In the paragraphs below we summarise the responses received through each of these mechanisms. It has been acknowledged that each of these has been considered in the preparation of the Strategy.

Submissions

2.50 Four written submissions were received, each of which are listed in Appendix B. Although three of the submissions were site specific, a number of important strategic points were made in all of the submissions. The key strategic issues identified were:

- i In general, production of the Strategy was welcomed and called for its close adherence to the RPG's principles and recommendations;
- ii The potential for urban renewal through retailing should be recognised and the need to preserve Clonmel's trading activity by increasing the pedestrianisation of streets in the town centre;
- iii The need to establish a retail trade association in Clonmel;
- iv The need for a retail park as, unlike many similar towns, Clonmel has a very small proportion of retail warehousing and no dedicated retail park. (It should be noted that this submission was made prior to the granting of planning permissions for large scale retail warehousing proposals at Clonmel;

- v Clonmel has a lack of suitable modern retail formats and space to cater for demand from international chains and facilitate the enhancement of the town's comparison sector;
- vi The need to sustain and build up the retail base of the smaller towns and villages should be recognised; and
- vii The Strategy needs to consider the many important economic and social benefits which large scale retail developments bring to towns such as Clonmel.

Public Meeting

2.51 The public meeting involved a good cross-section of Members of the County and Town Councils, local retailers and businesses and members of the public. The responses related to feedback on the key findings from the baseline review and assessment and the broad range of issues and opportunities that prevail. In summary, these were:

- The importance of Clonmel was confirmed and the need to ensure that this position is maintained and enhanced through a variety of measures including facilitating access and parking – the proposals for a multi-storey car park in Mary Street were highlighted and its linkage to Phase 1 of the pedestrianisation of O'Connell and Gladstone Streets.
- There is a shortage of units with footprints of about 200m² that would meet the requirements of national and international multiples who wished to locate in the town. This has restricted the market potential of the town and its competitiveness.
- Clonmel does not have enough draw at the moment – Waterford is a much better centre because it has more choice of comparison multiples and 'dry' access to the shops through parking being integral to the main shopping centre.
- It has been proven that if people are given the retail choice in Clonmel they will shop there and leakage to other centres will be offset.
- The need to have a balance of functions and a good mix of retail outlets in Clonmel in order to increase vibrancy and this includes restaurants and leisure provision.
- There is major expansion of the leading convenience operators in the Region which has implications for Clonmel if the town does not keep pace given the deficiencies identified by these operators in the town.

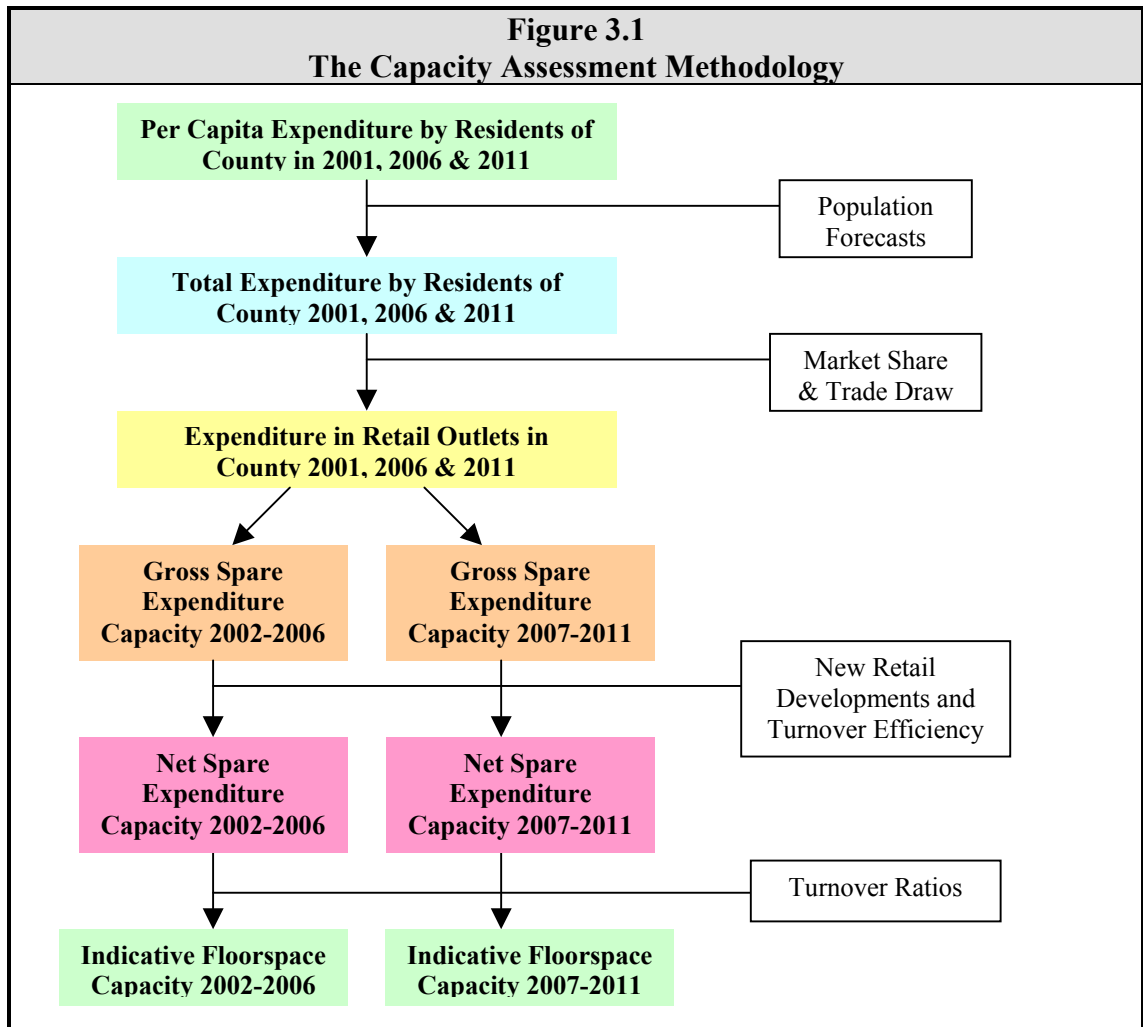
- The priority for Clonmel should be quality comparison floorspace and the opportunities for this require to be created.
- The only comment on other centres was in respect of Fethard which was seen to have experienced a steady decline in its retail offer.

3. BROAD ASSESSMENT OF ADDITIONAL FLOORSPACE

- 3.1 One of the key requirements of the RPG is that retail strategies should provide a broad assessment of the requirement for additional retail floorspace in counties over the timescale of their strategies. In compliance with the guidelines, this section of the Retail Strategy provides an assessment of the quantitative need for additional retail floorspace in South Tipperary based on the forecast growth in expenditure in the County that will occur over the period to 2011.
- 3.2 The starting point for this exercise is estimating the current per capita expenditure on retail goods by persons living in the County, a challenge in itself given the lack of up-to-date expenditure information at the national level. Per capita expenditure is then projected forward to 2011 and converted to total expenditure using County level population forecasts. Given the technical nature of this exercise, it has been confined to the Technical Appendix with only the results of the assessment presented in the Strategy.

PRINCIPLES & OBJECTIVES

- 3.3 The capacity assessment is the mechanism used to estimate the amount of additional expenditure that will occur in the County over the period of the Retail Strategy (to 2011) and the type and amount of additional floorspace that will be required in order to accommodate this expenditure. At the same time, allowances must be made for any:
- i New retail outlets that are planned to come on-line – extant planning permissions;
 - ii Increases in sales in existing stores due to improvements in turnover efficiency; and
 - iii Expenditure in alternative forms of retailing – this includes e-retailing, mail order sales and market stalls. It excludes wholesale retail and car sales outlets, as laid down by the RPG.
- 3.4 Figure 3.1 provides an overview of the process used in undertaking the capacity assessment.



3.5 The key steps in the assessment are as follows:

- **Step 1:** Expenditure Estimates
- **Step 2:** Turnover Estimates and Ratios
- **Step 3:** Gross Additional Expenditure Potential
- **Step 4:** Future Sources of Retail Sales
- **Step 5:** Net Additional Expenditure Potential
- **Step 6:** Indicative Floorspace Potential.

EXPENDITURE ESTIMATES

3.6 Using the official publications, specifically the *1998 Annual Services Inquiry (ASI)* and the recent publication *County Incomes and Regional GDP 1999*, we obtain

estimates of retail expenditure by the **resident population** in South Tipperary for 1998. These estimates are then projected forward to 2001, with high and low forecasts (based on our expectations for total disposable income growth in the County) up to 2011. The resulting expenditure estimates are outlined in Table 3.1 below.

Table 3.1					
Expenditure by the Residents Population on Retail Goods Sold in Retail Outlets (2001 prices)*					
Period	Per Capita Expenditure (€)		Population	Total Expenditure (€m)	
	Conv	Comp		Conv	Comp
2001	2,462	2,647	78,584	193.5	208.0
2006 High	2,652	3,242	82,052	217.6	266.0
2006 Low	2,633	3,179		216.0	260.8
2011 High	2,857	3,942	85,744	245.0	338.0
2011 Low	2,815	3,795		241.4	325.4
* Totals may not sum due to rounding differences					
Note: Population projections based on the preliminary results of the 2002 Census of Population					

TURNOVER ESTIMATES & RATIOS

- 3.7 The total level of turnover in retail outlets located in the County is calculated by applying the following steps:
- i Estimate the total expenditure available in the County (from Table 3.1);
 - ii Subtract the amount of leakage to outside of the County (proportion retained is known as the **market share**);
 - iii Add the amount of imported spend from tourists and visitors from beyond the County (also known as the **trade draw**).
- 3.8 The household surveys indicate that South Tipperary has a market share of 98% and 85% for convenience and comparison retailing respectively. The shoppers surveys show that persons living outside of South Tipperary account for 21% and 44% of convenience and comparison turnover respectively. The market share estimates are comparable to those derived in other county retail strategies. However, the trade draw estimates are higher than normally observed, particularly for comparison expenditure and are therefore likely to be over-estimated. This is primarily due to the timing of the surveys (mid June). However, in the context that this is a broad assessment of retail floorspace, these figures are adopted and used to derive the turnover estimates. Table 3.2 sets out the turnover (total spend) in retail outlets in the County for 2001.

Table 3.2 Turnover Estimates (2001 prices)*				
Factors	Convenience		Comparison	
	%	€m	%	€m
Resident Expenditure		193.5		208.0
Less Expenditure Outflow	1.9	3.7	15.1	31.4
Expenditure by Residents on Outlets in County		189.8		176.6
Add Imported Expenditure	20.6	49.2	44.1	139.3
Turnover of Retail Outlets in South Tipperary		239.0		315.9
* Totals may not sum due to rounding differences				

- 3.9 Turnover ratios (sales per m²) can be derived using the figures set out in Table 3.2 and figures from the floorspace survey. The implied turnover ratios for the entire County of €11,122 per m² for convenience retailing and €5,737 per m² for comparison retailing (note that these are 2001 prices). We would consider the turnover ratios in the convenience sector to be quite healthy although below that found in a number of comparable counties, while those for the comparison sector are quite high and would suggest some degree of over-trading based on our work on other county retail strategies.

GROSS ADDITIONAL EXPENDITURE POTENTIAL

- 3.10 Using the imported expenditure figures set out in Table 3.2, forecast non-resident expenditure is estimated. It is assumed that this follows the same rate of growth as that for the resident population up to 2011. Adding together the growth in resident and non-resident expenditure provides the estimate of the additional expenditure potential in the County over the period to 2011.

Table 3.3 Additional Expenditure Potential on Retail Goods (€m, 2001 prices)*								
Period	Convenience				Comparison			
	2002-2006		2007-2011		2002-2006		2007-2011	
	Low	High	Low	High	Low	High	Low	High
Resident Population	22.5	24.1	25.4	27.4	52.8	58.0	64.6	72.0
Non-resident Population	5.7	6.2	6.3	7.0	35.1	38.5	42.9	48.0
Additional Expenditure Potential	28.2	30.3	31.7	34.4	87.9	96.5	107.5	120.0
* Totals may not sum due to rounding differences								
Note: 2001 is used as the starting point for analysing the additional expenditure potential in the County. However, the growth in expenditure is assumed to occur from the beginning of 2002.								

FUTURE SOURCES OF RETAIL SALES

- 3.11 As already highlighted, some of the additional expenditure potential will be captured by other sources of retail sales and will have a bearing over the period 2002 to 2011. This will be due to new retail developments already in the pipeline, increases in turnover efficiency and the growth in Internet sales.
- 3.12 It is estimated that new retail developments will capture €8.9m of convenience and €38.8m of comparison expenditure over the period to 2006. The existing floorspace in the County is expected to capture additional comparison expenditure of €16.1m by 2006 and €16.9m by 2011 due to turnover efficiency. In addition, the floorspace from the new developments is also expected to capture additional comparison expenditure of €2.0m between 2007 and 2011.
- 3.13 Finally, growth in ‘other’ retail sales, mainly through the Internet, will capture additional comparison expenditure of between €3.9m and €4m to 2006 and between €16.3m and €16.9m to 2011.

NET ADDITIONAL EXPENDITURE POTENTIAL

- 3.14 Subtracting the expenditure arising from future sources of retail sales from the gross additional expenditure potential in Table 3.3 results in estimates for the net additional expenditure potential for the period 2002 up to 2011. These are provided in Table 3.4.

Table 3.4				
Net Additional Expenditure Potential (2001 prices, €m)				
Period	Convenience		Comparison	
	Low	High	Low	High
2002-2006	19.3	21.4	30.1	38.6
2007-2011	31.7	34.4	72.3	84.2
Total	51.0	55.8	102.4	122.8

INDICATIVE FLOORSPACE POTENTIAL

- 3.15 Now that we have an estimate as to how much additional expenditure will occur in the County between 2002 and 2011, we need to determine how much additional retail floorspace is needed in the County in order to meet this expenditure. This is achieved through applying turnover ratios to the expenditure figures, which yields the indicative floorspace required in South Tipperary over the period of the Strategy. These figures are set out in Table 3.5.

Table 3.5				
Indicative Net Floorspace Capacity(m²)				
Period	Convenience		Comparison	
	Low	High	Low	High
2002-2006	1,400	1,500	4,800	6,100
2007-2011	2,300	2,400	11,500	13,400
Total	3,700	3,900	16,300	19,500

- 3.16 The high scenario indicates that there is potential to increase the County's floorspace by a further 26,500m² over the timescale of the Strategy to 2011. This includes the recent extant planning permissions in Clonmel for 18,000m² (gross) of retail warehousing. There is, therefore, scope for retail floorspace to increase during the life of the Strategy.
- 3.17 It must be stressed that, consistent with the RPG requirements, the figures presented are indicative and should be treated as **broad planning guidelines**. They are not intended to be prescriptive. It is not the function of the capacity assessment to place a cap on the scope for future retail developments in South Tipperary but to give a broad assessment of the requirement for additional floorspace in the County over the period of the Strategy based on predicted trends in expenditure and population. Other factors and influences require to be taken into account to ensure that the needs and potential of the County are best met.

4. THE RETAIL HIERARCHY

4.1 Determination of the County Retail Hierarchy is a key component of the County Retail Strategy and the future pattern of retailing in the County. In order that the most appropriate structure is defined, the current framework was reviewed. The components of this were:

- i The RPG hierarchy;
- ii Statutory development plans;
- iii County Strategy for Economic, Social and Cultural Development; and
- iv Other influences.

4.2 In addition in this section, in accordance with the RPG, we review and consider the following:

- The roles and functions of different centres in the hierarchy
- The role and importance of the retail hierarchy.

NATIONAL RETAIL HIERARCHY

4.3 The RPG sets a five tier hierarchy. The only **Tier 1** centre in the national hierarchy is Dublin which, as well as providing the broadest range of comparison goods shopping, 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 – are the **Tier 2** centres in the national hierarchy. With Dublin, these centres provide a range of high order comparison shopping which is largely unmatched elsewhere. The RPG identifies a split level **Tier 3** of centres and, although they state that these cannot be precisely defined, the guidelines identify the centres that sit in both levels of this third tier. **Clonmel** is the only centre in the County identified as a **Level 1 Tier 3** centre. Other centres with this designation are Ennis and Kilkenny. The Level 1 Tier 3 centres are acknowledged as vibrant centres and that some of these are now attaining functions previously found only in higher order centres. These three first tiers in the hierarchy account for 78% of comparison and some 66% of convenience turnover respectively.

4.4 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 **Level 2 Tier 3** centres. In the RPG, there are no centres in this band within the County but Nenagh and Thurles in neighbouring North Tipperary are. This

level of centre does not have the scale or diversity of retail floorspace as Clonmel, Ennis or Kilkenny.

- 4.5 The RPG **Tier 4** centres are identified as being small towns with populations ranging from 1,500 to 5,000 which largely provide basic convenience and lower order comparison shopping. Based on the 1996 Census, all of the other main centres in the County, with the exception of Fethard would be within this level of the national hierarchy. The preliminary results of the 2002 Census would indicate that Carrick-on-Suir and Tipperary Town in population terms have broken the barrier of the 5,000 population threshold and as such could be designated as Level 2 Tier 3 centres. From our work on other retail strategies, the same can be said for many other centres around the country but they on the whole do not display the same quantum and quality of retail floorspace and other town centre functions that the RPG designated centres at this higher level in the hierarchy have. The guidelines present the provision for review and we would recommend that it is through this mechanism that any amendments of designation are pursued in order that there is consistency of application at a national level.
- 4.6 Based on the 1996 Census, Fethard sits in **Tier 5** of the national retail hierarchy. The 2002 results indicate that it breaks the entry threshold of 1,500 to Tier 4 of the hierarchy. Looking at its retail and other town centre offer, it is not comparable to the existing Tier 4 towns in the County. This illustrates why it is important that until there is a review of the guidelines then the current RPG hierarchy must hold true if differentiations are to be consistently applied. However, this should not inhibit introducing additional levels within the current tier structure at a County level and this has been the approach adopted in the other retail strategies that we have prepared.
- 4.7 **Tier 5** is the final tier in the national retail hierarchy and is identified as shopping at the most local level, namely corner shops in suburban areas and village stores and post offices. Table 4.1 summarises application of the national hierarchy at the County level and highlights the County's centres.

Table 4.1 RPG Retail Hierarchy		
Tier	Location	Function
1	Metropolitan Dublin	Convenience, broadest range of comparison and specialist shops not found elsewhere in State.
2	Cork, Galway, Limerick, Waterford	Convenience and high order comparison largely unmatched elsewhere.
3 Level 1	Includes but not precisely defined by Athlone, Carlow, Castlebar, Clonmel , Drogheda, Dundalk, Ennis, Kilkenny, Letterkenny, Monaghan, Mullingar, Newbridge, Portlaoise, Tralee, Tullamore, Wexford	Convenience, comparison and now attaining functions previously only found in higher order centres.
3 Level 2	Arklow, Athy, Ballina, Cavan, Dungarvan, Enniscorthy, Killarney, Longford, Mallow, Midleton, Naas, Navan, Nenagh, New Ross, Sligo, Swords, Thurles	Third tier 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.
4	75 towns in the 1,500-5,000 population category including: Cahir, Carrick-on-Suir, Cashel and Tipperary Town	Basic convenience shopping in small supermarkets or convenience shops. In some cases lower order comparison shopping such as hardware.
5	Corner shops, village stores and post offices at a local level including Fethard and all other centres in South Tipperary	Rural shop and post office noted for its importance in supporting social and economic life.

STATUTORY DEVELOPMENT PLANS

4.8 The current and emerging development plans covering the County are listed in Section 2. Our review of these plans indicates that whilst there are retail and town centre policies there is no specific guidance on a **retail hierarchy** within the County. The County Retail Strategy is looked to provide this for incorporation in the County's development plans. There is however a preferred **settlement hierarchy** defined in the Draft County Development Plan. Whilst settlement hierarchies have a different function and relate to a wider range of considerations and factors, it is important to enable clarity in the Council's objectives that there is a direct relationship between the County Settlement and Retail Hierarchies. As such the Draft Plan's settlement hierarchy has been taken due account of in the development of the County Retail Hierarchy. Following analysis of a number of scenarios, the Draft Plan's preferred growth/settlement strategy is based on '*Creating a hierarchy of growth nodes*'. This is summarised as follows:

- i **Clonmel** with a catchment population of over 50,000 will be promoted as the primary growth centre for high-growth, high-tech industries, as a primary retail centre, a third level education provider and a strong and an attractive residential centre for a growing population;

- ii **Carrick-on-Suir** will be promoted as a secondary business centre servicing the town and catchment population;
- iii **Tipperary** will be promoted as a market town for west Tipperary and as one of three heritage towns in the County. Its residential function will be strengthened, its retail function as a market town enhanced and its strong leisure resources protected and improved;
- iv **Cashel** and **Cahir** will be further developed as tourist destinations and as residential centres for local catchments;
- v **Fethard** will remain a rural settlement with strong links with the equine industry and will be further developed as both a residential centre and a historic town; and
- vi The many villages identified in the Plan will require major improvements in infrastructure to ensure that they will become attractive settlement centres and assist in the long term viability and vitality of rural South Tipperary.

COUNTY STRATEGY FOR ECONOMIC, SOCIAL AND CULTURAL DEVELOPMENT

4.9 As noted in Section 2, the CDB's Strategy does not set out a settlement strategy or hierarchy as such but identifies two economic zones:

- The zone dominated by Clonmel including Carrick-on-Suir, Fethard, Cashel and Cahir
- Areas distant from Clonmel, such as West Tipperary and Slieve Ardagh.

4.10 However, the **Local Agenda 21 Wheel** defined in the CDB Strategy illustrates a retail services hierarchy as follows:

- i **Region:** Regional Shopping Centre, Speciality Shops, Retail Warehousing;
- ii **County Town:** Greater Range of Retail/Specialised Shops & Entertainment Services;
- iii **Small Town:** Range of Retail Shops, Entertainment Services; and
- iv **Village:** Shop, Pub.

- 4.11 In addition, we have highlighted that one of the CDB Strategy's main objectives is to strive towards achieving balanced development in the County. The importance of the two zonings and this objective should thus have an influence on the shape of the County's Retail Hierarchy and consequently the distribution of new retail floorspace.

OTHER INFLUENCES

- 4.12 In addition to national and local policy frameworks, there are other influences and considerations that require to be taken into account to ensure that the County Retail Hierarchy reflects the particular characteristics of the County. These include the findings and analysis from the surveys and health checks. The influences are identified in Table 4.2 and a review of these is summarised in the paragraphs that follow.

Table 4.2 Summary of Settlement Characteristics					
Town	RPG Hierarchy	Population (1996)	Floorspace (m ²)	Diversity	Location
Cahir	4	2,236	4,949	G	West Central
Carrick-on-Suir	4	5,172	7,040	H	South East
Cashel	4	2,687	4,586	G	North West
Clonmel	3(i)	15,586	31,552	H	South Central
Fethard	5	1,397	1,331	L	Central
Tipperary Town	4	4,854	11,764	H	West

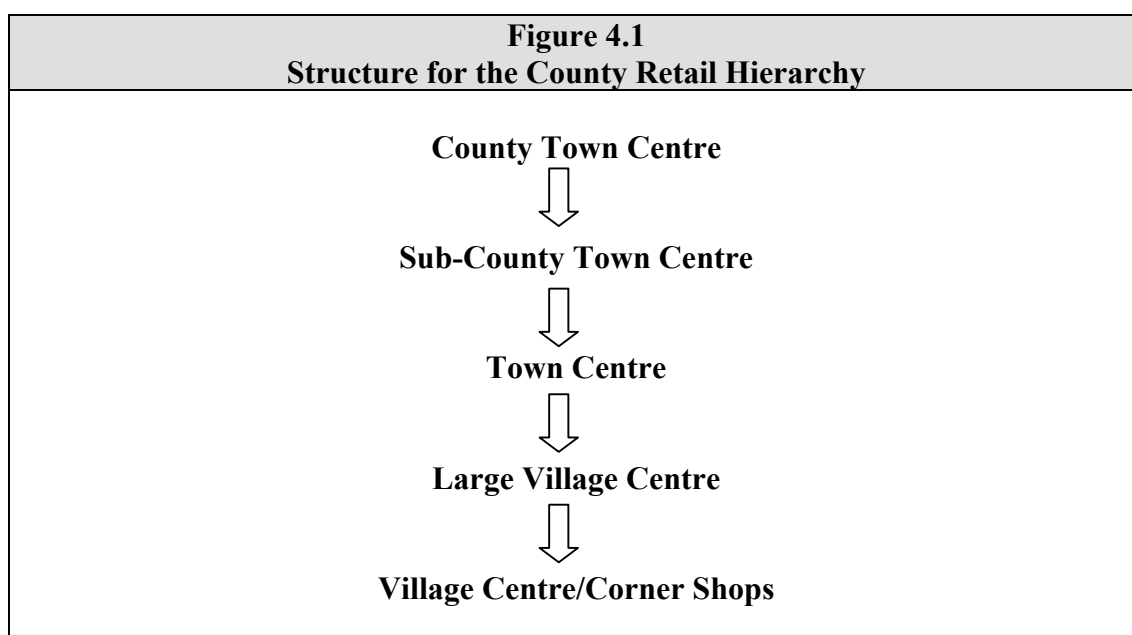
- 4.13 **RPG Hierarchy:** the table summarises the analysis of where the County's centres sit within the national retail hierarchy that has been outlined above.
- 4.14 **Population:** as has been noted, population is one of the criteria that informs where a centre should be in the retail hierarchy. Based on the 1996 and 2002 Census results, of the current RPG Tier 4 centres in the County only Carrick-on-Suir would step over the Tier 4 5,000 population threshold. However, when the town is compared with those centres in the next tier up the hierarchy – as illustrated in Table 4.1 – then Carrick-on-Suir does not at present have the characteristics of these higher order centres such as Nenagh and Thurles. Fethard breaks the 1,500 population threshold set for Tier 4 centres by the guidelines which is where all the other main centres apart from Clonmel sit in the national hierarchy. It is clear from Table 4.2 that it is not a comparable centre to the County's current Tier 4 centres. However, it has more services and functions than other smaller Tier 5 centres around the County and this requires to be recognised in its positioning in the hierarchy.
- 4.15 **Existing Floorspace:** it is clear that Clonmel is the dominant retail centre in the County Hierarchy. On the next rung is Tipperary Town in the west of the County followed by Carrick-on-Suir in the south east. There are comparable levels of

floorspace in both Cahir and Cashel with Fethard coming at the bottom of the main centres' floorspace league in the County.

- 4.16 **Diversity:** of services and functions is an important indication of the strength of a centre. This includes the range of banking and professional services, the presence of a Post Office, school, hospital or Garda Station, commercial office floorspace, hotels, restaurants and bars, theatres, cinemas, museums or other cultural centres and churches. Table 4.2 summarises our qualitative assessment of the diversity that prevails in each of the County's centres. Clonmel, Carrick-on-Suir and Tipperary Town have high diversity of town centre offer, Cahir and Cashel good diversity and Fethard a low level of diversity.
- 4.17 **Geographical Location:** an important strength of the County is the centrality of Clonmel and the range and attraction of its retail offer, as well as its other higher level services. This requires to continue to be enhanced over the timescale of the County Retail Strategy if the County is to sustain and enhance its competitive position against neighbouring counties. However, there is also a need to consider other centres and their role at the sub-county level. Specifically, Carrick-on-Suir and Tipperary Town to the east and west of the County respectively already play important sub-regional roles in South Tipperary's shopping patterns. Their locations and roles are important in two respects:
- i They reduce the requirement for local people in the towns and their hinterlands to travel to meet their shopping needs, particularly in respect of convenience shopping; and
 - ii They can serve to stop the flow of expenditure to neighbouring counties/competing centres.
- 4.18 **Existing Shopping Patterns:** an important consideration in any review of retail hierarchies is the existing shopping patterns of residents and the attraction of visitors as these indicate the importance and role of any centre. These patterns are set out in Table 2.4. From the table we can see that Clonmel is the main centre for all shopping trips, with Carrick-on-Suir and Tipperary Town being important for main food and top up and less so for bulky and clothing/footwear although Tipperary Town has a good market share of bulky goods spend. Both of these centres, with Clonmel, also attract higher levels of spend from outside of the County than the other three main centres.
- 4.19 All of the policy and other influences have provided the basis of our evaluation of the County Retail Hierarchy. This is provided in Section 6.

THE ROLES AND FUNCTIONS OF TOWNS

- 4.20 The RPG retail hierarchy provides a valuable and clear starting point for consideration of the appropriate structure at a county level. It requires to be translated into a framework that is appropriate to the specific attributes of South Tipperary's retail and settlement structure. Founded on our review and analysis of the attributes of each of the main centres in the County, the following structure for the County's retail hierarchy is identified in Figure 4.1 below:



- 4.21 The **County Town Centre** in the County is Clonmel. Our analysis confirms its importance in the County and reaffirms its designation as a **Level 1 Tier 3** centre in the national retail hierarchy. It serves a catchment that extends across the County and beyond. In accordance with comparable towns at this level in the RPG hierarchy, it should have potential for significant comparison floorspace, including some higher order shopping, and offer a wide range of non-retail services. The priority is to ensure that the potential is created to ensure that the quantum and quality of comparison floorspace can be delivered in the town centre. However as it is the County Town, then Clonmel will continue to have a key role in meeting the main food shopping and convenience needs of the County. It is anticipated that over the timescale of the Strategy and in the years that follow as the retail offer of the other main centres improve and mature then the town's dominance of the convenience sector will reduce. The emphasis in Clonmel requires to be on comparison floorspace, and specifically higher order comparison floorspace, if the competitiveness of the County is to be sustained and enhanced.
- 4.22 At the next level in the hierarchy, Carrick-on-Suir and Tipperary Town emerge as **Sub-County Town Centres** in the County Retail Hierarchy. This reflects their size,

quantum of retail floorspace, geographical locations and the extent of their catchment areas within and beyond the County's boundaries. At present, both are **Tier 4** centres in the national retail hierarchy but there is scope for the centres to grow and improve into Level 2 Tier 3 centres based on comparison with centres currently at this level in the RPG hierarchy. These centres are smaller than the County Town Centre and should be anchored by convenience shopping, offer lower order comparison retailing and have a more limited service role. At present, in both centres comparison retail floorspace predominates and this requires to be redressed if they are to grow their strategic importance and reduce the need for travelling to Clonmel and external higher order centres to meet in particular the County's main shopping needs in each of their respective geographical locations.

- 4.23 Below the Sub-County Town Centres in the County Retail Hierarchy are **Town Centres**. These are the other RPG **Tier 4** centres in South Tipperary. There are two centres designated as Town Centres in the County Retail Hierarchy – Cahir and Cashel. Both towns serve a much more local catchment area than either of the Sub-County Town Centres but are important centres in their rural hinterlands. As with all of the centres in the County, the floorspace in each is predominantly comparison and they should better provide for convenience needs.
- 4.24 Fethard has been identified as a main centre in the brief for the study. It is the only main centre in the County that comes under the designation of a **Tier 5** centre in the RPG hierarchy. This reflects its smaller population primarily. At the County level, it is a **Large Village Centre** with a limited retail and service offer reflected in its small catchment area draw in comparison to the other main centres in the County. In centres of this size, there should be a greater representation and quality of convenience floorspace to meet the needs of the local population. Compared with other centres of its size, Fethard is under performing in its retail offer and the potential of its hinterland. As has been highlighted, this can be largely attributed to its proximity to the offer and attraction of Clonmel.
- 4.25 In the County and the country, the remaining **Tier 5** centres are **Village Centres/Crossroads** and **Rural Shops**. These are predominantly anchored by an independent convenience store with limited, if any other retail floorspace or services. Whilst the thrust of the County Retail Strategy is at the higher level centres in the hierarchy, it must also seek to encourage and protect provision at this level in the County Retail Hierarchy.

THE ROLE AND IMPORTANCE OF THE RETAIL HIERARCHY

- 4.26 The County Retail Strategy requires to deal with retail issues of a strategic nature. One such issue is the distribution of **major** new retail floorspace and as such, as highlighted above, its primary focus is on the upper levels of the hierarchy namely the County Town(Clonmel) and Sub-County Town Centres(Carrick-on-Suir and

Tipperary Town). This objective is not set to deter or discourage smaller scale retail development and investment in smaller centres in South Tipperary. It is however important that the hierarchy set is clear as the distribution of new floorspace should be linked to the retail hierarchy for South Tipperary and should be appropriate in scale and character to the hierarchical role of the centre. In response, the hierarchy set out above is deemed clear and provides the guidance necessary for the distribution of new floorspace. This noted, Table 4.3 provides guidance on the type of shopping that is appropriate to different levels of the hierarchy. This is not intended to be prescriptive and our emphasis is on the word *guidance*.

Table 4.3					
County Retail Hierarchy – Appropriate Shopping Provision					
	High Order Comparison	Middle Order Comparison	Low Order Comparison	Superstore	Supermarket
County Town Centre	✓	✓	✓	✓	✓
Sub-County Town Centre			✓	✓	✓
Town Centre			✓		✓
Large Village Centre			✓		✓
Village Centre/ Local Centre/ Corner Shop					✓

5. RETAIL DEVELOPMENT POTENTIAL

5.1 The previous sections of the report have set out the policy and quantitative foundations for the County Retail Strategy. This section reviews and addresses the influencing factors at a settlement level to determine the retail potential of the main centres in the County to accommodate additional retail floorspace over the lifespan of both the County Development Plan and the Retail Strategy. The factors that are considered are:

- i Issues and opportunities;
- ii Definition of the core retail areas within the main centres; and
- iii The sequential approach.

ISSUES AND OPPORTUNITIES

5.2 The assessment of the issues and opportunities has been informed by:

- The health checks set out in the supporting Technical Appendix to the Retail Strategy
- Site and core retail area appraisals undertaken by the study team
- Meetings with Council Officers
- Discussions/consultations with local agents/auctioneers
- Consultations.

5.3 They are reviewed at a settlement level in the following alphabetical sequence:

- i Cahir;
- ii Carrick-on-Suir;
- iii Cashel;
- iv Clonmel;
- v Fethard; and
- vi Tipperary Town.

Cahir

- 5.4 Cahir is designated as a Tier 4 Centre in the national retail hierarchy and a Town Centre in the County Retail Hierarchy. It is identified in the Draft County Development Plan as a Level 4 centre in the County Settlement Hierarchy, along with Cashel. The Draft Plan promotes the development of the town as a tourist destination and residential centre for its local catchment area.
- 5.5 The town serves the west central area of the County and is second smallest of the main centres in population but the third in respect of quantum of retail floorspace. Cahir is however the fastest growing centre in the County in respect of population and this has been the position since 1991 with the rate significantly increasing since 1996. Whilst this is from a small baseline population, it reflects the attraction of the town and its attributes as a place to live.
- 5.6 Largely due to its importance as a tourist destination, Cahir's retail profile is quantitatively predominantly comparison floorspace. This is largely due to the size of one main outlet – Fleury Antiques – which we understand is a major attractor to the town. Set against this in comparison to other centres of this size, particularly noting the preliminary results of the 2002 Census, it is not well served in respect of meeting local needs in either convenience or comparison floorspace. This is well reflected in the fact that some 63% of local people in the town's hinterland do their main food shopping in Clonmel and top up shopping levels in the town are well below any of the other main centres in the County. Looking at comparison shopping, this too is predominantly undertaken elsewhere largely due to the specialist nature of the offer. The centre retains only some 19% and 4% of bulky goods and clothing and footwear spend from its catchment area/zone. The remainder largely finds its destination in Clonmel. Noting these issues, Cahir has a good diversity of town centre functions and attractions that reflect the importance of tourism in the town's economy.
- 5.7 The town has a pleasant ambience that benefits from the profile of the number of buildings of heritage importance and architectural merit including Cahir Castle and the Swiss Cottage. Cahir also has the Craft Granary which is a flagship project in the South East Region dedicated to the promotion and development of craft makers. It houses a gallery and retail centre. However, the town suffers from its location on the N24 National Primary Route between Limerick and Waterford which causes congestion at peak times. This serves to detract from the asset of its heritage and is likely to reduce the full potential of the town's attraction being harnessed. Given the population growth statistics, the issues do not appear to detract from the attraction of the town as a place to live. Congestion will be alleviated with the implementation of the NDP improvements, specifically the routes identified between Bansha and Rathkeevin which will bypass the town. A preferred route has been identified for the scheme but at present there is no programme set for implementation.

- 5.8 At present, and for the foreseeable future, Cahir's role will be predominantly meeting local convenience needs. Our consultations revealed no market interest in new retail floorspace. Any expansion of floorspace will be market driven and it is important that land and property is available to meet any interest that emerges, accepting that this is likely to be small scale in the context of the County's potential over the period of the Strategy. In respect of the convenience market, the lack of market interest can largely be attributed to the increasing draw of Clonmel. On the comparison floorspace front, the lack of market interest has to be put in the context of the wider economy. The issues affecting the County and country's tourism economy over the last year/eighteen months have slowed down any interest in investment in the tourism sector outlets. This noted, there is scope for the town's tourism offer to be increased and improved.

Carrick-on-Suir

- 5.9 Carrick-on-Suir is a Tier 4 centre in the RPG hierarchy and a Sub-County Town Centre in the County Retail Hierarchy. It is the County's second largest town and third largest in respect of retail floorspace. The Draft County Development Plan recognises Carrick-on-Suir's importance in the County's Settlement Hierarchy and in the preferred settlement strategy promotes it as a secondary business centre servicing the town and its catchment population. At the national level in the recently published NSS, the strengths and potential of the town are also recognised. Within the South East Region, with Clonmel, Carrick-on-Suir is noted as one of the centres that provide good bases for population and services which will attract investment and employment activities additional to those located in or near a 'gateway'. Within the Region, Waterford is the gateway with Kilkenny and Wexford identified as growth 'hubs'.
- 5.10 The designation of Carrick-on-Suir as a Sub-County Town Centre in the County Retail Hierarchy reflects all of the above factors and designations. It also takes account of its important role in the shopping patterns in the south east of the County and its role in its wide rural hinterland which extends beyond the County's boundaries. The town has a good retention of both top up and main food shopping spend but considerable leakage of comparison expenditure to both Clonmel and Waterford. The former indicates its importance as a service centre for this area of South Tipperary as, within the County context, the town has a high level of diversity of services and functions. The leakage of comparison expenditure reflects the quality of its comparison offer and the attractions of the two higher order centres. This is not an issue that is unique to the town but is a characteristic of similar sized towns in relative close proximity to higher order centres. It is one that requires to be addressed as this trend is likely to increase with the pending improvements of road and public transport infrastructure.
- 5.11 It is a historic market town with many attractive features but the overall visual amenity of Carrick-on-Suir is poor when set against its potential and that of other centres in the County. To a degree, this can be partly attributed to the congestion

stemming from its location on the N24 National Primary Route. As with Cahir, and Tipperary Town, this will be alleviated with the implementation of the NDP improvements but as yet there is no programme set for implementation. It is a centre that could benefit from a coherent environmental improvement programme/vision if its attraction and competitiveness is to be sustained and enhanced.

- 5.12 Carrick-on-Suir has a compact retail core along the main spine route. It has limited opportunities to meet the modern space requirements of the market. This to a degree is reflected in the number of vacant properties(not the same as vacant floorspace) which is a feature of all of the County's centres apart from Cashel. The lack of good retail footprints may be deterring the market as there is no market interest in retail space in the town. However, this fact should be set against the context of the most dynamic periods of retail investment that the County and country has witnessed which suggests that there may be other issues that prevail although none of these were identified in any of our consultations.
- 5.13 Accepting the lack of market interest, designation of Carrick-on-Suir as a Sub-County Town Centre in the County Retail Hierarchy may serve to stimulate interest. What requires to be addressed is that should interest emerge, there are inherent difficulties in meeting modern convenience and comparison floorspace needs within the town centre. As such, unless there is land assembly and remodelling of buildings then edge of centre and out of centre locations will require to be looked to if the town is to grow into its role as the Sub-County Town Centre for the east of the County.

Cashel

- 5.14 Cashel is the fourth largest town in terms of population and floorspace in the County. It is a Tier 4 centre in the national retail hierarchy. As noted, the Draft County Development Plan preferred settlement strategy identifies Cashel as a Level 4 centre, along with Cahir. The Plan promotes the development of the town as a tourist destination and residential centre for its local catchment area. On the basis of our evaluation, it is identified as a Town Centre in the County Retail Hierarchy.
- 5.15 The town has a historic and pleasant ambience and is best known for the famous Rock of Cashel. As part of its ambience is the good townscape quality of the town. At present, traffic congestion is a major issue as the main N8 Dublin to Cork National Primary Route passes through the town centre. This should be resolved with the implementation of the Cashel Bypass which is scheduled for completion in 2006.
- 5.16 In contrast to the other main centres in the County, Cashel is predominantly a convenience centre and has good rates of expenditure retention for both main food and top up shopping, particularly the latter. Local people shop predominantly in Clonmel for comparison goods which would be expected given the relative proximity

of the County Town. A characteristic of Cashel's comparison offer is the high incidence of outlets geared to the town's important tourist market.

- 5.17 At the time of the baseline review and assessment, market conditions in Cashel were relatively buoyant with good units being sold or let as soon as they became available. This strength is not reflected in either the vacancy ratios for either floorspace or number of units – there are more vacant units in the centre than those geared to the tourist industry. Until recently, there was no market interest in new retail floorspace. However, in the latter stages of the preparation of the Strategy an application was submitted for a Lidl store on the Cahir Road which provides evidence of the potential of the town and its catchment area. The lack of interest prior to this has been attributed to the uncertainty in respect of implementation of the town bypass and its impact on the town. The bypass is looked at as having both positive and negative impacts for the town. The former require to be harnessed and the latter addressed to the benefit of the vitality and health of the town centre.

Clonmel

- 5.18 Clonmel is a Level 1 Tier 3 centre in the national retail hierarchy. The importance of this designation is reflected by the fact that only Dublin and the regional capitals sit above it in the national context. As has been highlighted, in the RPG Clonmel is on a comparable level to key regional centres and county towns in this broad area of the country, including Ennis, Kilkenny and Wexford. It is the County Town Centre in South Tipperary but is also regarded as '*Capital of Tipperary*' despite being at the southern end of the 'County'. Its position and importance as the County Town is reinforced in the Draft County Development Plan's Settlement Hierarchy where it is promoted as the primary growth centre and primary retail centre in the preferred settlement strategy. All of these factors confirmed its designation as the County Town in the County Retail Hierarchy.
- 5.19 The strengths and attractions plus issues and opportunities that prevail in the centre's retail and wider town centre offer are summarised in the paragraphs that follow. However, in considering the centre's potential, it is important to highlight the potential impacts on the town and consequently the County's competitiveness and attraction arising from the recent designations under the NSS. In the South East Region the NSS intends for critical mass to be enhanced through Waterford performing as a Gateway, supported by Kilkenny and Wexford as hubs. The NSS also focuses on enhancing the performance of the Limerick-Shannon Gateway, supported by Ennis as a hub, to promote balanced regional development in the Mid West Region. While many other Level 1 Tier 3 centres in the RPG hierarchy are designated as hubs in the NSS, Clonmel is not included as one of these towns. However, the NSS does cite Clonmel (along with Carrick-on-Suir) as a town with 'development opportunities' that is placed strategically between the gateways of Limerick-Shannon and Waterford. Assuming no action/development takes place in

Clonmel over the period of the Strategy, the potential effects of the NSS could be as follows:

- i The regional gateways/capitals (Limerick and Waterford) and closest hub (Kilkenny) grow in importance and size, thus encouraging more leakage of retail expenditure from the County. This could be further exacerbated by the programmed improvements in road and public transport infrastructure under the NDP which will make travel to these centres from the County's easier. This has to be set against the background that each of these centres have already witnessed significant improvements to their retail and town centre offers in recent years and this is set to continue through programmed investment, extant planning consents and the policies and initiatives emerging from their respective retail strategies; and
- ii Clonmel will not remain an equal Level 1 Tier 3 centre in the national retail hierarchy as those centres that have been designated in the NSS will, as a result of the designation, be higher on the investment programmes of retailers, investors and developers.

It is thus important that the County Retail Strategy sets the policies and initiatives that provide the mechanisms and opportunities for Clonmel to sustain its role in the national hierarchy and serve as the focus for the County maintaining and enhancing its retail and economic competitiveness.

- 5.20 Clonmel is an historic County Town which has a compact and traditional urban form consistent with its function as a market town. It is an attractive town centre in townscape and setting. The town has a good mix of multiple and independent retailers offering a wide range of retail goods. These have worked well together to consolidate the town centre. It is predominantly a comparison centre which is what it should be as a centre at this level in the national retail hierarchy. In addition, as the County Town, the town has a high diversity of functions and services and a low level of vacant retail floorspace. It is a vibrant town centre that dominates shopping patterns in South Tipperary.
- 5.21 Whilst the level of vacant floorspace is low, there is a higher percentage of vacant units than there should be which suggests that these retail footprints do not meet the requirements of modern convenience and comparison operators. This is confirmed by our consultations with local agents/auctioneers and is a common issue with the majority of larger centres, including city centres, around the country. There is good and strong demand from national and UK/European multiples to locate in the town but these requirements cannot be met through existing available floorspace or unit formats. Whilst the retail offer is predominantly comparison, it is a smaller quantum and proportion than nearby Kilkenny or, at the higher level in the RPG hierarchy, Limerick or Waterford. In addition, Clonmel does not have the range, quality and profile of national and international comparison operators as these centres. This applies to higher order town centre multiples and edge of centre/out of centre bulky goods operators. In respect of the latter, this will be greatly redressed by the recent planning consents for retail warehousing. However, all of these competing centres

have proposals in the pipeline to significantly improve their bulky goods offer. In respect of higher order comparison shopping, that being high street brand names/national/international operators in the clothing, footwear and furniture sectors, unless it is being provided locally then people will travel to get it. These issues were particularly highlighted and understood by participants in the October 2002 public meeting.

- 5.22 Clonmel is an attractive County Town providing a wide range of supporting town services and infrastructure, however it does not have the diversity and quality of comparable centres such as Ennis and Kilkenny in respect of hotels, restaurants and other supporting infrastructure that attract visitors but also provide the focus for local people meeting, eating and greeting. As such, it does not achieve the same level of national and international visitors which are important in the overall health, vitality and attraction of centres around the country and is not attracting the levels of local patronage that it should or could.
- 5.23 From the above summary analysis it is clear Clonmel is a centre that, in accord with its level in the national retail hierarchy, should be aiming at securing higher representation of high street multiple retailers in the town centre. It is also clear that there is little scope for enhancement of comparison floorspace within the town centre due to the size of retail footprints and need to preserve the architectural heritage of the town centre. There are land and sites which could assist resolving this issue by enabling expansion of the town centre. These are the showgrounds(1.76ha) to the east, the Chadwicks/Nationalist site(1.06ha) to the north and the opportunity for redevelopment of Suir Island to the south of the town centre respectively.
- 5.24 Expansion of the town centre may be constrained in how car parking needs can be met and hence accessibility to the shops and other services. Car parking and accessibility were issues also identified in the household and shoppers surveys and have important implications in respect of the attraction and competitiveness of the centre. This has been recognised by both the County and Town Councils in the commissioning of the of the 2001 Traffic Management Study, which recommended that a multi-storey car park be developed at the current car park site in Mary Street. The feasibility for this proposal is currently being investigated within the framework of a Public Private Partnership.
- 5.25 For Clonmel to sustain and improve its competitiveness there is a need to address these issues in order that there are the opportunities for the town to accommodate large scale levels of new retail floorspace over the timescale of the Strategy and the years beyond. Whilst, as has been highlighted in Section 1, it is not the brief of the Retail Strategy to undertake this but a function of the Clonmel and Environs Development Plan, our assessment of the opportunities would identify that the options which require to be considered are:
- Expansion of the town centre

- Identification of edge of centre sites
- Out of centre locations.

These options will require greater analysis and the strategic guidance provided in Section 6 sets the framework for how this should be approached.

- 5.26 It is clear that for Clonmel to remain in the top of the league of Level 1 Tier 3 town centres then the issues and opportunities identified require to be squarely addressed. The preference should be the town centre which is consistent with the national guidelines and the sequential approach. This may take time to achieve given the complexities and issues that prevail with the assembly of town centre sites and a parallel strategy of edge of centre and out of centre sites may require to be considered, as has been the approach adopted in other counties through their retail strategies. One option is to enable relocation of major convenience floorspace from the town centre which has been identified in consultations as an option. Whilst not highlighted in the public meeting as an issue, there is concern that the loss of major convenience operators from town centres will have an impact on the vitality and viability of a centre. This largely is related to the experience of the impact of out of centre retail developments on town centres in the UK. Many lessons have been learnt from this, the prime one being that out of centre investment has to be balanced with in centre investment by both the public and private sectors. Additionally, there has to be recognition that the role of town centres has been changing and even without the pressures/effects of major out of centre retail developments. Retailing whilst a key component of town centres now has a different dimension and is part of the leisure experience, particularly in higher order centres. This is the successful route that the competing centres are taking and must be a serious consideration in any proposals for the future profile of Clonmel Town Centre.

Fethard

- 5.27 Fethard is the smallest of the main centres in the County and under the RPG hierarchy is designated as a Tier 5 centre. In the Draft County Development Plan preferred settlement strategy it is a Level 5 centre. The Plan promotes that Fethard will remain as a rural settlement developed as both a residential centre and historic town. Its size and attributes, primarily the level and range of retail floorspace and other services, characterise it as a Large Village Centre in the County Retail Hierarchy. It however has a number of bars and restaurants that attract in visitors and thus there is a base to build on.
- 5.28 The village's proximity to Clonmel reduces its importance and role in its small but expanding catchment area. As a result, Fethard has a very limited retail offer and a poor level of other services for a centre of its size. In view of the Glanbia DIY store, which is the largest outlet in the town, then the centre's total floorspace is skewed as being predominantly comparison. It is however a small local centre served by small convenience stores that are a mix of independents and symbol group shops. These

factors combine to make the centre quiet and lacking vibrancy. Possibly as a consequence, the village has continued to decline in population whilst its rural surrounding area has experienced an increase. These issues have been recognised by the County Council and are responded to in the current Fethard Development Plan. The village centre environment is of reasonable quality and there is evidence of recent investment in environmental improvements.

- 5.29 There are few vacant units but this is not a reflection of market interest in the centre. There is no interest in either existing units or developing new floorspace. This can largely be attributed to the attraction and offer of nearby Clonmel to which there is a high level of leakage main food shopping, bulky goods and clothing and footwear expenditure. The centre however retains a high proportion of its top up shopping spend. For Fethard's retail offer and other village centre functions to improve will require the population of the town to increase. This will bring demand for other local services, both public and private sector. These require to be located within the village centre if people are to be attracted in and other stores and services are to benefit. A key issue however is identifying land or buildings within the centre that would have the critical mass to attract/interest convenience operators. The alternative is edge or out of centre locations which may be a land use option but may not be one that is attractive to the market due to the closeness of national and international multiples on Davis Road at Clonmel.

Tipperary Town

- 5.30 Tipperary Town is a Tier 4 centre in the national hierarchy. In the Draft County Development Plan's preferred settlement strategy it is identified as a Level 3 centre below Carrick-on-Suir. The Plan promotes Tipperary Town as a market town for west Tipperary and one of the three heritage towns in the County. Additionally, it is an objective of the Plan that the retail function of Tipperary Town as a market town will be enhanced and its strong leisure resources protected and improved.
- 5.31 It is the second largest retail centre and third largest town in the County. The balance of its floorspace is tipped towards comparison particularly when retail warehousing floorspace is taken into account. Until the recent retail warehousing consents at Clonmel, it had an equal level of bulky goods floorspace to the County Town. Independent operators, both convenience and comparison, predominate but there is a good range of symbol group stores and a Lidl. The presence of Lidl indicates the town's importance as a convenience centre and this is confirmed by the surveys which illustrate a high level of expenditure retention. These also show the wide catchment draw of the town and confirm its role as the main town in the west of the County. However, with the exception of bulky goods, there are high levels of comparison expenditure leakage which reflects the town's poor comparison offer. This leakage is primarily to both Clonmel and Limerick.

- 5.32 The majority of retail floorspace is located within the compact heart of the town centre. It is a vibrant town centre with a wide range and diversity of services and commercial leisure, reflecting its role and attraction as a market town. As the former County Town, before the split into the two ‘Ridings’ in 1838, it has an historic core with many fine and impressive frontages and buildings. The asset of these are not being harnessed. As a result, Tipperary Town does not have the townscape quality of Clonmel. This is also largely due to the heavy congestion brought by its location on the busy N24 National Primary Route. Implementation of the NDP N24 road improvements between Pallasgreen and Bansha will provide a bypass to the town and will greatly improve the environment and ambience of the town centre. A preferred route has been identified for the scheme but at present there is no programme set for implementation.
- 5.33 Tipperary Town is a tourist centre for its large rural hinterland which includes the Glen of Aherlow and the Galtee Mountains, both of which attract large numbers of visitors each year. The quality of the town’s commercial leisure offer – bars, restaurants and hotels – does not fully capture this potential and it needs to see this sector enhanced if its tourism role and importance is to be improved.
- 5.34 The presence of Lidl is a positive sign in terms of the market attraction of the town but currently there is little active interest in other investment in existing stock or new schemes. It appears that having a large rural catchment area is not sufficient to attract market interest. One factor that has been identified as underpinning this is the lack of a major employer in or close to Tipperary Town. There is a need for the town to further improve its retail offer if it is to sustain its importance in its hinterland for convenience shopping. This is particularly pertinent given the road improvements that are pending or underway, such as the Limerick Southern Ring Road, and the relative proximity of shopping centres around the city.

CORE RETAIL AREAS

- 5.35 All of the centres reviewed above were examined on the ground in respect of defining their Core Retail Areas. The definition of Core Retail Areas is a considerable move from the broad town centre uses zonings that have characterised development plans on the whole to date. It is thus important to clarify what Core Retail Areas are and why they have emerged as an instrument of policy and a requirement of the RPG. We address these under the following headings:
- i What characteristics define Core Retail Areas?;
 - ii Why is it important to define them?; and
 - iii How is this applied at the County settlement level?

Characteristics that define Core Retail Areas

- 5.36 The Core Retail Area of the centre is normally defined as the area including and immediate to the ‘prime pitch’. This is the area that achieves the highest rentals, best yields, is highest in demand from operators, is overwhelmingly retail floorspace and has the highest footfall of shoppers. Outside of this area there may be other important retail areas but these are also characterised by a mix of uses which may be service related or even residential. These are termed secondary and tertiary retail areas and are only normally a feature of larger centres. In fact, some smaller centres may not have what can be defined as a Core Retail Area as the centre may be fragmented and the retail market more locally driven.

Why is it important to define Core Retail Areas?

- 5.37 The RPG set down the sequential approach to the determination of retail applications. This essentially recognises the importance of sustaining the retail importance, vitality and viability of town centres. The emphasis in the RPG is on town centres, their redevelopment and expansion. Proposals for major retail schemes are required to take due cognisance of this as follows:
- 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. In the RPG these are defined as sites that are within 300 – 400 metres of the **Core Retail Area**
 - Only after the options for town centre and edge of centre are exhausted should out of centre locations and sites be considered.
- 5.38 Therefore in order to be able to conduct the sequential approach, as required by the RPG, then the starting point is the definition of the Core Retail Area of main centres.

How is this applied at the County settlement level?

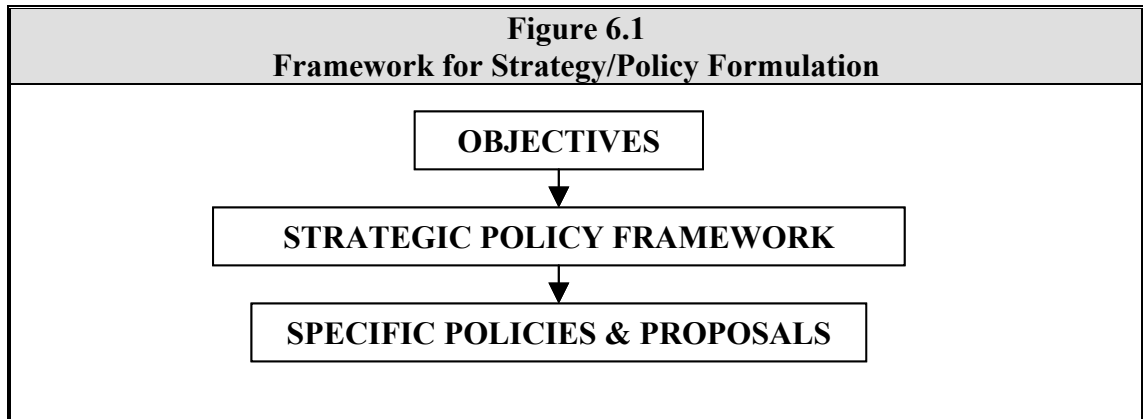
- 5.39 The focus is on **main centres** as this is where large scale new retail development will be located, through the control applied by respecting the retail hierarchy. Additionally, from the health checks it is clear that it is not always necessary or appropriate for Core Retail Areas to be defined for smaller centres in the hierarchy. The main centres are taken to be those that are at the highest levels in the County Retail Hierarchy, namely Level 2 and 3 centres. Core Retail Areas are defined for these centres in the final section of the Strategy.

THE SEQUENTIAL APPROACH

- 5.40 The principles of the Sequential Approach are summarised above. As part of the preparation of the Strategy, we reviewed the retail development potential of each of the six centres against its criteria. As the purpose of the Retail Strategy was to address potential at the settlement and not site specific level then only a general assessment and overview is provided.
- 5.41 It is important to reiterate that the County Retail Strategy requires to deal with retail issues of a strategic nature and as such the distribution of **major** new retail floorspace. We highlighted in Section 4 that its primary focus is on the upper levels of the hierarchy which is where any major new floorspace should go – Clonmel, Carrick-on-Suir and Tipperary Town. In general, in all three of these centres there will be difficulty in delivering the appropriate quantum and quality of new retail floorspace within the core retail areas in view of lack of suitable and available sites and buildings. This is a common feature of historic towns around the country. Additionally, the position can be seen to equally apply to edge of centre opportunities at least for the foreseeable future. For each of the three main towns in the period to 2006 of the Strategy, a key requirement will be the need to identify potential sites and opportunities to bring forward over the longer term timescale of the Retail Strategy in order that future retail needs can be met. This will include identifying:
- i Potential for site assembly and regeneration in town centres;
 - ii Edge of centre sites at key locations to overcome the constraints of meeting need within the town centre; and
 - iii Out of centre sites where it is proven not to be possible to meet retail needs in town centre or edge of centre sites.

6. STRATEGIC RESPONSE – THE COUNTY RETAIL STRATEGY

6.1 Every retail planning strategy must be clear as to its purpose and what it is intended to achieve. To ensure this, we have adopted a logical step by step framework. This is summarised in Figure 6.1 below.



AIMS

6.2 The objectives of the Retail Strategy set the framework for the strategic policies and specific policies and proposals. They provide a clear definition of the purpose of the Strategy and what it is intended to achieve across the County over the period to 2011. They are:

- **Objective 1:** To sustain and improve the retail profile and competitiveness of South Tipperary within the retail economy
- **Objective 2:** To address leakage of retail expenditure from the County by providing the means to strengthen the range and quality of its retail offer
- **Objective 3:** To ensure an equitable, efficient and sustainable spatial distribution of main centres across the County
- **Objective 4:** To confirm a hierarchy which assists in achieving the County's preferred settlement strategy and objectives and provides clear guidance on where major new retail floorspace would be acceptable

- **Objective 5:** To ensure that the retail needs of the County's residents are met as fully as possible within South Tipperary
- **Objective 6:** To encourage and facilitate innovation and diversification in the County's retail profile and offer
- **Objective 7:** To encourage and facilitate the re-use and regeneration of derelict land and buildings for retail uses, with due cognisance to the Sequential Approach as indicated in the RPG
- **Objective 8:** To promote and sustain the importance of retailing in the County's tourism economy
- **Objective 9:** To provide the criteria for the assessment of retail development proposals.

STRATEGIC POLICY FRAMEWORK

6.3 To achieve the Strategy's objectives requires due cognisance to be taken of the strategic policy framework that underpins specific policies and proposals. This framework is set by:

- i The retail hierarchy;
- ii The core retail areas;
- iii The sequential approach;
- iv Spatial distribution of new retail development; and
- v Consideration of need.

Retail Hierarchy

6.4 Following review of the Draft County Development Plan Preferred Settlement Strategy and consideration of the issues and opportunities prevailing in each of the County's main centres, it is recommended that the following County Retail Hierarchy is adopted:

- **Tier 1 – County Town Centre:** Clonmel

- **Tier 2 – Sub-County Town Centre:** Carrick-on-Suir and Tipperary Town
- **Tier 3 – Town Centre:** Cahir and Cashel
- **Tier 4 Level 1 – Large Village Centre:** Fethard
- **Tier 4 Level 2 – Village Centre/Local Centre:** All other centres/groups of shops

Core Retail Areas

6.5 The Core Retail Areas for each of the main centres in the County are described as the primary retail areas in the following settlements:

- i **Clonmel:** the primary retail area includes O’Connell Street, Gladstone Street, and Mitchell Street, Market Place and Marystone. The secondary retail areas extend to Upper Gladstone Street including the Oakville Shopping Centre, Parnell Street, the eastern side of Irishtown and the southern end of Mary Street;
- ii **Carrick-on-Suir:** Main Street and extending to Greystone Street; and
- iii **Tipperary Town:** the primary retail area includes Main Street and Bank Place. The secondary retail areas include Church Street and Lower Bank Place.

Sequential Approach

6.6 The Strategy identifies the distribution of new retail floorspace at a settlement but not a site level. The identification of sites and locations will be the function of the County Development Plan and development and other plans that are specific to different settlements in the County. However, it is important to highlight that in meeting the aims of the Strategy, policies and proposals in respect of the location of retail development must be in accordance with the principles set by the sequential approach in the RPG. The sequential approach in summary defines that:

- The preferred location for new retail development, where practicable and viable, is within a town centre (or large village centre).
- Where it is not possible to provide the form and scale of development that is required on a site within a town centre then consideration can be given to a site on the edge of the town centre so as to encourage the possibility of one journey serving several purposes. An edge of centre site is taken to be one that is unlikely to be more than 300-400 metres from the edge of the prime

shopping area, and less in smaller settlements. The distance considered to be convenient will however vary according to local circumstances.

- Only after having assessed the size, availability, accessibility and feasibility of developing sites and premises, firstly within a town centre and secondly on the edge of a town centre, should alternative out of centre sites be considered where it can be demonstrated that there are no town centre or edge of centre sites which are suitable, viable and available.

6.7 In formulating specific policies and proposals, it is recognised that in general retail warehouses do not fit easily in to town centres given their size requirements and the need for good car parking facilities and ease of servicing. As such, in some instances it may be possible to locate retail warehouse groups on the edge of town centres.

Spatial Distribution of New Retail Development

6.8 The County Retail Strategy, in accordance with the RPG, provides the strategic policy framework for the spatial distribution for new retail development. The emphasis is on strategic guidance on the location and scale of major retail development. The Strategy does not seek to inhibit small scale retail development in centres around the County, particularly in smaller centres. It should be taken to be implicit in the aims of the Strategy that such developments should be encouraged and facilitated to enhance the sustainability, vitality and viability of smaller centres in the County Retail Hierarchy. The hierarchy sets the framework for the spatial distribution of the quantum of convenience and comparison floorspace. The following provides guidance on how the Retail Strategy defines the distribution of strategic and non-strategic retail floorspace within the Retail Hierarchy.

- **Tier 1.** – major convenience and comparison
- **Tier 2** – predominantly additional convenience but not excluding comparison
- **Tier 3** – convenience and tourism related comparison
- **Tier 4** – primarily small scale convenience floorspace.

6.9 Additionally, the Strategy recognises the need to ensure that local needs, primarily convenience shopping and local services, are met in an equitable, efficient and sustainable way in major existing or new residential areas in and around main settlements through the designation of locations for District or Neighbourhood Centres in development plans.

- 6.10 In setting floorspace targets for main centres, the expenditure capacity potential of the County should not be taken as a cap on new development to 2011. Town centres and shopping centres draw shoppers from their individual catchment areas and these areas will cross the County's boundaries. The size of the catchment area will depend on the importance and attraction of the centre/development. There will require to be reference to the overall expenditure capacity of the County but this should be put into the context of what that of the catchment area of a retail development is.

Need

- 6.11 The consideration of need in the County Retail Strategy addresses that at both the strategic level and the local level. The principles in respect of the latter are highlighted above. Need is therefore addressed at the strategic level in the Strategy in respect of:
- i The County's competitiveness; and
 - ii The distribution of additional new floorspace to best meet the needs of the County's population and contribute to achieving the objectives of the Draft County Development Plan's preferred settlement strategy.
- 6.12 **County's Competitiveness:** in order to sustain and improve the County's competitive position, then the Strategy must provide the policies and proposals that facilitate this. At present, set against the findings from other comparable counties' retail strategies, South Tipperary has a high level of both convenience and comparison expenditure retention. The County also has higher levels of expenditure inflows in both sectors than its comparators. However, retailing is one of the most dynamic sectors in the economy and neighbouring counties, through the policies set by their retail strategies, are seeking to ensure that their retail offers particularly in respect of higher order comparison floorspace are significantly improved and enhanced. This has implications for the County's centres and their attraction, particularly given the programmed improvements to roads and public transport infrastructure in the Region and neighbouring regions.
- 6.13 To date, as set by the national retail hierarchy, the County has the designations that sustain its competitiveness in the Region. The main driver for this is Clonmel – the County Town. However, the NSS introduces a strategic framework that has potential implications for this being sustained given that the main competing retail locations of Kilkenny, Limerick and Waterford are identified as gateways and hubs for economic growth and investment in the NSS. In addition, other centres around the country that are designated as the same level in the RPG hierarchy as Clonmel have also been designated as priorities within the NSS. Whilst the NSS has significantly greater objectives than the requirements set for county retail strategies, it does introduce differentiations that again could have implications for the competitiveness of Clonmel

and the County as a whole and the County's attraction against others to retail investors, developers and operators.

- 6.14 The County Retail Strategy requires to address these external influences and their potential impacts on the County's main towns and its competitiveness to ensure that over its timescale this is both sustained and enhanced.
- 6.15 **Distribution of New Retail Floorspace:** the broad assessment of expenditure capacity for additional floorspace indicates that there is a need for a substantial amount of both convenience and comparison floorspace across the County, relative to the quantum of existing floorspace, particularly in respect of comparison. The assessment indicates that there expenditure potential for convenience floorspace to increase by nearly 21% on current levels of provision by 2011. In addition to the permissions in the pipeline for retail warehousing space, there is potential for the County's comparison floorspace to increase by approximately one third of current provision. The assessment illustrates that currently, the County is underprovided in retail floorspace and there is a need to redress this over the period of the Retail Strategy. Examination of the quality and distribution of existing floorspace informs how best this need should be met:
- Clonmel dominates the convenience sector which is appropriate in its role as the County Town and this should be sustained. At a strategic level, there however requires to be an improvement of the offer within the two Sub-County Towns of Carrick-on-Suir and Tipperary Town with improvement at a smaller more local scale within the remaining main towns in the County. This structure and distribution will reduce the need to travel to meet retail need, apart from for higher order shopping needs which should continue to be met within the County Town.
 - Consistent with its role as a Level 1 Tier 3 centre in the national retail hierarchy, Clonmel is predominantly a comparison centre and has the majority of the County's comparison floorspace. It is the location where a significant proportion of major new comparison floorspace should go and the emphasis should be on higher order national and international multiples and further retail warehousing in order that the competitiveness of the County is sustained and improved. At the Sub-County Town Centre level, there requires to be an improvement in the quality of comparison floorspace. In respect of high street brands, this will largely be market driven and will respond to the maturing and improvement of both towns' roles in the retail hierarchy. As part of the strategy of ensuring an efficient, equitable and sustainable distribution of floorspace across the County, there is scope for small scale provision of retail warehousing in both Carrick-on-Suir and Tipperary Town. In the other main centres, apart from small scale niche retailing through independent operators, the emphasis will be on the tourism sector which will include these niche retailers. Delivery of this floorspace will be market driven and needs to be

encouraged as part of ensuring the competitiveness and attraction of the County's tourism profile and offer.

SPECIFIC POLICIES AND PROPOSALS

6.16 The specific policies and proposals of the County Retail Strategy are designed to facilitate achievement of the aims of the Strategy. They are formulated to ensure:

- Existing or emerging issues in the County's retail profile and its centres have the policy framework to be addressed
- The County has the policy framework to ensure strategic and local convenience and comparison shopping needs are met and the competitiveness of the County's main centres is enhanced
- The expenditure capacity potential for additional floorspace is harnessed over the timescale of the Strategy (Table 3.5).

6.17 The policies and proposals are grouped under the following three categories:

- | | |
|--|--|
| i. Strategic Policies: | relate to the spatial distribution of centres, specific centres, their role in the hierarchy and the strategic aims of the Strategy; |
| ii. General Policies: | set principles that should be applied across the hierarchy; and |
| iii. Framework for the Assessment of Retail Developments: | sets out the assessment criteria that will be used in the appraisal of future retail proposals. |

Strategic Policies

6.18 Table 6.1 identifies the strategic policies that underpin the Retail Strategy.

Table 6.1 Summary of Strategic Policies	
Policy Reference	Policy
Policy RS1: County Town Centre – Clonmel	<i>It is the policy of the Council to promote and encourage major enhancement and expansion of retail floorspace and town centre activities in Clonmel Town Centre to sustain its competitiveness as the major centre in the County</i>
Policy RS2: Sub-County Town Centres – Carrick-on-Suir and Tipperary Town	<i>It is the policy of the Council to facilitate and encourage the consolidation and improvement of retailing and other town centre activities in Carrick-on-Suir and Tipperary Town Centres to enable enhancement and development of their roles as the key centres in the east and west of the County</i>
Policy RS3: Town Centres – Cahir and Cashel	<i>It is the policy of the Council to encourage and facilitate the consolidation of and enhancement of the retail offer and tourist attraction of Cahir and Cashel and their roles as a main centres in the County Retail Hierarchy</i>
Policy RS4: Large Village Centre - Fethard	<i>It is the policy of the Council to facilitate and encourage the provision of shops and services that enhance the offer and attraction of Fethard to better meet the needs of the existing population</i>

Policy RS1: Major Town Centre - Clonmel

It is the policy of the Council to promote and encourage major enhancement and expansion of retail floorspace and town centre activities in Clonmel Town Centre to sustain its competitiveness as the major centre in the County

- 6.19 **Justification:** Clonmel is recognised as one of the most important towns in the country through its designation as a Level 1 Tier 3 centre in the national retail hierarchy. Its importance at the County level is set down in the Draft County Development Plan's preferred settlement strategy which confirms Clonmel as the primary growth centre and primary retail centre in South Tipperary. Consistent with the RPG hierarchy and the Plan and its objectives, Clonmel is designated as the Tier 1 County Town in the County Retail Hierarchy.
- 6.20 Clonmel is the only major retail centre within the County and sustaining and enhancing its competitiveness is central to the County Retail Strategy. To achieve this, in the Regional context, requires a significant enhancement of the town's comparison offer and consolidation and improvement of its main food shopping floorspace. In respect of the expenditure potential for new comparison floorspace in the County, based on comparison with other centres at the same level in the national retail hierarchy, for Clonmel to sustain its competitiveness then at least 80% of potential comparison floorspace requires to be delivered within and around the County Town. The priority should be quality retail developments that attract higher order comparison operators, including specifically national and international multiples

but there is also potential for additional retail warehousing. It should also be the location for any new major convenience floorspace which would include a superstore.

- 6.21 It has an attractive and vibrant town centre and attracts shoppers and visitors from across the County. Clonmel however does not have the national and international market penetration that some of its key competitors do. To achieve this will require enhancement in the range and attraction of the town's supporting tourism infrastructure, including hotels, restaurants, bars and cultural activities.
- 6.22 **Actions:** for Clonmel to achieve the strategic objectives set by the Retail Strategy within the timescale of the Strategy will require a number of actions to be pursued and progressed. These include the following:
- A vision and masterplan for the town that harnesses its assets and address its issues/weaknesses
 - The identification of the land and/or buildings to capture the demand from operators for major convenience and higher order comparison floorspace
 - A review of the town's tourism and leisure offer and its role in attracting visitors to the town
 - The preparation of a marketing strategy/prospectus for the town
 - The enhancement and improvement of the town centre and its offer cannot be driven by the public sector alone. It requires a partnership between the County and Town Councils, local businesses, the community and private sector development interests and this should be a priority action.

Policy RS2: Sub-County Town Centres – Carrick-on-Suir and Tipperary Town

It is the policy of the Council to facilitate and encourage the consolidation and improvement of retailing and other town centre activities in Carrick-on-Suir and Tipperary Town Centres to enable enhancement and development of their roles as the key centres in the east and west of the County

- 6.23 **Justification:** Carrick-on-Suir and Tipperary Town are Tier 4 centres in the national retail hierarchy and are identified as the second and third most important towns in South Tipperary in the Draft County Development Plan preferred settlement strategy. They are the main centres in the east and west of the County respectively and serve a key role in meeting the retail and service needs of these areas of South Tipperary. In accord with these factors, Carrick-on-Suir and Tipperary Town are designated as the Tier 2 Sub-County Towns for the east and west of the County in the County Retail Hierarchy.

- 6.24 In order that Carrick-on-Suir and Tipperary Town grow into their roles and importance as a key retail centres in the County, there will have to be enhancement of their retail and town centre offers. Each of the towns has different characteristics and issues and there will require to be different mechanisms put in place to address these for each town. However, there are certain common factors that require similar responses. At present due to a variety of reasons, including traffic congestion and relatively poor environment (in comparison to Clonmel in particular), there is no market interest in new retail floorspace in either town. However, recent investment in convenience floorspace in Tipperary Town by an international discount operator indicates that the potential of centres with large rural catchment areas is recognised. Congestion issues will be addressed by the implementation of the NDP improvements to the N24 National Primary Route. This is likely to be beyond the timescale of the early period of the Retail Strategy to 2006. Environment and townscape quality issues should be addressed as the environment to attract investment, shoppers and visitors requires to be created.
- 6.25 In the first instance, the priority should be increasing convenience floorspace with a new supermarket within or close to both town centres. This will further aid retention of convenience expenditure and reduce the need for local people in their wide rural catchment areas to travel to meet their main food shopping needs. It will also serve to retain convenience expenditure within the County by diverting the need for trips to neighbouring counties. A new supermarket within or close to the town centre will aid the consolidation of town centre activities and attract shoppers. This in turn, as the centres improve their profile and attraction, should over the timescale of the Strategy provide the catalyst for encouraging national comparison multiples interest in the towns. With both new convenience and comparison floorspace, there will be a need to provide the land and/or buildings to enable the right modern formats to be available. It is likely that initial interest in comparison floorspace will come from the retail warehouse/bulky goods sector. This will add to the attraction of both towns as retail centres, acknowledging that Tipperary Town already has representation of this sector. In keeping with the towns' level in the County Retail Hierarchy, it is not envisaged that schemes would be above the lower threshold of the RPG floorspace cap.
- 6.26 Heritage is part of the attraction of both Carrick-on-Suir and Tipperary Town, with the later being promoted as one of the three heritage towns in the County in the Draft County Development Plan. The asset of heritage and history in both should be better promoted as part of their town centre offer which will help raise the profile and attraction of the towns as a place to shop and visit for local people and visitors alike.
- 6.27 **Actions:** for the consolidation and improvement of retailing and other town centre functions in Carrick-on-Suir and Tipperary Town to be realised requires a series of actions to be pursued for both towns:

- Preparation of an environmental improvement and heritage/interpretation strategy
- Audit of land and buildings in and around the town centre to identify potential development opportunities/sites for new retail floorspace to be incorporated in the town's Draft Development Plan
- The audit of development opportunities should be market tested with national and international convenience operators, the large format symbol groups and local and regional agents and auctioneers to raise awareness of the potential
- The enhancement and improvement of the town centre and its offer cannot be driven by the public sector alone. It requires a partnership between the County and Town Councils, local businesses, the community and private sector development interests and this should be a priority action.

Policy RS3: Town Centres – Cahir and Cashel

It is the policy of the Council to encourage and facilitate the consolidation of and enhancement of the retail offer and tourist attraction of Cahir and Cashel and their roles as main centres in the County Retail Hierarchy

- 6.28 **Justification:** Cahir and Cashel are Tier 4 centres in the national retail hierarchy but have much more limited retail and town centre functions than either Carrick-on-Suir or Tipperary Town. Additionally, they are smaller settlements of very different character to the two larger centres. These factors are recognised in the Draft County Development Plan preferred settlement strategy which places Cahir and Cashel at Level 4 in the County Settlement Hierarchy as centres for tourism and residential development. The lower designation equally applies within the County Retail Hierarchy which designates the centres as Tier 3 Town Centres reflecting their role and importance as main centres within the South Tipperary.
- 6.29 Cahir and Cashel and their immediate rural areas were amongst the fastest growing settlements in the County in the period from 1996. They both play important roles in local convenience shopping, particularly in respect of top up shopping although Cashel probably due to its slightly greater distance from Clonmel does retain a good proportion of its main food shopping expenditure. As these centres continue to grow there is an increasing need to ensure that convenience needs are locally met. It is unlikely that over the timescale of the Strategy that large scale convenience floorspace will be necessary or sustainable in either centre but there is potential for additional smaller scale stores and supermarkets. These should be encouraged within the Cahir and Cashel Town Centres and in local centres where there is residential development and population growth. In respect of the former, this will be dependent on the availability of suitable land and buildings and achieving land assembly within a reasonable timescale. As such, in order that need and potential are met over the

timescale of the Strategy then, subject to the sequential approach, alternative edge of centre and out of centre locations may require to be looked to.

- 6.30 The changing rural economy has resulted in tourism and residential development being the strengths that sustain the economies of these two small towns. Based on recent trends, comparison floorspace demand will come predominantly from the tourism sector. Re-use of land and buildings for this purpose should be encouraged given that on the whole there is a shortage of suitable or available retail floorspace within either town centre. Tourism is a sector that is proven to be susceptible to external influences, especially in respect of international visitors. As such, there is a need to increase the penetration of the domestic visitor market.
- 6.31 The tourism industry, accepting its fluctuations from time to time, is a highly competitive sector. The product of a centre is all embracing including supporting tourism infrastructure, the quality and ambience of the environment, the tourism offer (why people visit in the first instance) and the interpretation of what is there. Both Cahir and Cashel score well on many of these factors but there is scope for improvements that could further enhance their attraction.
- 6.32 **Actions:** a set of actions are required if the asset and attraction of Cahir and Cashel for living and visiting are to be further promoted. These are:
- Land and buildings with potential for new retail floorspace require to be identified and the owners/market made aware of the acceptability of retail uses
 - In new residential areas land will need to be zoned in the relevant development plans to ensure that the need for small scale convenience floorspace is recognised
 - Tourism and heritage strategies should be prepared that identify the potential of each centre and the actions required to capture this
 - There will be a need for the public, private and voluntary sectors and other local people to work closely together to achieve the objectives of the Retail Strategy.

Policy RS4: Large Village Centre – Fethard

It is the policy of the Council to facilitate and encourage the provision of shops and services that enhance the offer and attraction of Fethard to better meet the needs of the existing population

- 6.33 **Justification:** Fethard, along with other rural centres in the County, is designated as a Tier 5 centre in the national retail hierarchy. Its importance as one of the main centres

in the County is recognised in its identification as a Level 5 growth centre in the Draft County Development Plan's preferred settlement strategy where it is promoted as a rural centre that will be further developed both as a residential centre and an historic town. This differentiates the centre from the other small centres in the County and this has been recognised in its designation above these centres as a Tier 4 Level 1 Large Village Centre in the County Retail Hierarchy.

- 6.34 For Fethard to meet the objectives of the Draft County Development Plan, the population decline in its urban area requires to be stemmed and its attraction as a local centre for its surrounding rural hinterland greatly improved. A key mechanism in achieving this will be improving the attraction of the village and its rural hinterland as a place to live through enhancing the retail and services offer of the village centre, particularly in respect of convenience floorspace. This will serve to help reduce the need for local people to travel to meet their daily needs. Reflecting its level in the County Retail Hierarchy, the quantum of any retail floorspace is likely to be small and of the scale and nature of a small supermarket. It is important that land and buildings for any new convenience floorspace is found within the centre of the village if its vitality and attraction are to be improved. It is accepted that due to ownership and the size of development footprints that this may not be possible but it should be the starting point in any consideration of locations for new retail floorspace.
- 6.35 The ambience and attraction of the village centre would be greatly enhanced with environmental improvements to the public realm and commercial frontages. This will require joint working between the public sector and individual owners of premises. As part of environmental enhancement, there requires to be promotion of the history and heritage of Fethard, particularly in respect of its strong links with the equine industry. This would stimulate interest in the village and enhance its attraction to retailers and for other village centre activities. Due to Fethard's proximity to Clonmel, combined with its size and other attributes, it is unlikely to be a centre where any major retail floorspace is located over the timescale of the Strategy.
- 6.36 **Actions:** as has been highlighted, the County Council will require to work with local businesses and residents if the environment to attract more shops and services to Fethard is to be achieved. The actions required are:
- An environmental enhancement strategy requires to be prepared for the centre of the village and liaison established with property owners and businesses in respect of commercial frontage improvements
 - A parallel but linked examination of the historical importance of the town and its links with the equine industry should be made to ascertain the scope for building on this to the benefit of the village and its economy.

General Policies

6.37 Table 6.2 presents the general policies of the County Retail Strategy.

Table 6.2 Summary of General Policies	
Policy Reference	Policy
Policy RS5: Village and Local Centres	<i>It is the policy of the Council to retain, encourage and facilitate the retail role of village and local centres and corner shops around the County</i>
Policy RS6: Retailing in Tourism and Leisure	<i>It is the policy of the Council to encourage and facilitate the development of retailing within the tourism and leisure sectors</i>
Policy RS7: New District and Neighbourhood Centres	<i>It is the policy of the Council to encourage and facilitate the development of new District and Neighbourhood Centres to meet the needs of new and growing areas of population</i>
Policy RS8: Enhancement of Towns and Villages	<i>It is the policy of the Council to encourage and facilitate the enhancement and environmental improvement of the County's towns and villages</i>
Policy RS9: Re-Use and Regeneration of Derelict Land and Buildings	<i>It is the policy of the Council to encourage and facilitate the re-use and regeneration of derelict land and buildings</i>
Policy RS10: Innovation in the County's Retail Offer	<i>It is the policy of the Council to encourage and facilitate innovation in the County's retail offer and attraction</i>

Policy RS5: Village and Local Centres

It is the policy of the Council to retain, encourage and facilitate the retail role of village and local centres and corner shops around the County

6.38 **Justification:** consistent with the RPG, as a large part of the County is predominantly rural then meeting needs locally is an important policy in the County Retail Strategy. Small village centres and local freestanding stores are an integral component of the life in the country serving needs wider than shopping. It is a sustainable objective to encourage and facilitate preservation of retail and other services in small communities.

Policy RS6: Retailing in Tourism and Leisure

It is the policy of the Council to encourage and facilitate the development of retailing within the tourism and leisure sectors

6.39 **Justification:** in a large number of towns, tourism related retailing is a key economic driver in respect of the vitality, viability and sustainability of other retail floorspace and services. It may not have matured in all centres in the County and the Strategy does not seek to inhibit this, rather it seeks to encourage such developments and initiatives. As such, it is thus important tourism related retail developments and

initiatives that will contribute to the health and wealth of the County's towns are allowed, subject to meeting the tests of the sequential approach and the Council's assessment criteria for retail developments.

Policy RS7: New District and Neighbourhood Centres

It is the policy of the Council to encourage and facilitate the development new District and Neighbourhood Centres to meet the needs of new and growing areas of population

- 6.40 **Justification:** the significant population growth that has occurred in South Tipperary is predominantly due to the considerable increase in recent years in the number of new large housing developments largely located on the fringe/environs of existing towns and villages across the County. In some cases, the existing retail floorspace in these towns/villages can no longer meet the needs of the increased local population. As a result, provision should be made in development plans for new District or Neighbourhood Centres where large scale residential developments have been developed or are planned to take place and the existing retail provision will not be sufficient to cater for the larger population.

Policy RS8: Enhancement of Towns and Villages

It is the policy of the Council to encourage and facilitate the enhancement and environmental improvement of the County's towns and villages.

- 6.41 **Justification:** the environment of the County's centres is equally important to their retail offer in attracting trade and achieving vitality and viability. This is recognised and evidenced by the County and Town Councils', and that of other bodies', investment in the fabric and public realm of many of the County's centres in recent years. Urban renewal and environmental improvement is a continuous requirement if the attraction of the County's centres is to be maintained and mechanisms require to be put in place to ensure that performance is monitored. The County benefits from a large number of towns and villages that have attractive and historic townscapes and environmental settings. To ensure that any new development proposals make a positive contribution to the townscape, character and ambience of centres across the County then considerable weight will be given to achieving quality in design, particularly in centres of heritage importance.

Policy RS9: Re-Use and Regeneration of Derelict Land and Buildings

It is the policy of the Council to encourage and facilitate the re-use and regeneration of derelict land and buildings in both main and smaller centres

- 6.42 **Justification:** re-use and regeneration of derelict/obsolete land and buildings is a sustainable objective. In the context of the County, it is additionally important as it will help achieve preservation of the character and quality of centres, particularly in

terms of vernacular/historical architecture, scale, height, density and massing. The potential for the re-use and regeneration of derelict buildings and brownfield sites in town/village centres and in edge of centre locations should be considered in the formulation of development proposals. Only when suitable, available and viable land and buildings cannot be found should alternative new build options be permitted.

Policy RS10: Innovation in the County's Retail Offer

It is the policy of the Council to encourage and facilitate innovation in the County's retail offer and attraction.

- 6.43 **Justification:** this policy is consistent with the guidance in the RPG. The retail industry and market has been proven to be one of the most dynamic and competitive economic sectors across Europe. As the country's retail market matures, lessons from Europe indicate that this will further increase at a county and centre level. Retailing is a key part of the County's tourism offer and as such is important to the urban and rural economy. Encouraging and facilitating innovation, be that in trading format, location or product, will assist the County both sustain and increase its competitiveness and attraction.

FRAMEWORK FOR THE ASSESSMENT OF RETAIL DEVELOPMENTS

- 6.44 All applications for significant retail development should be assessed against a range of criteria. In addition to those set out in the RPG, the guidelines also require that the County Retail Strategy identifies the criteria for the assessment of retail developments. As a general rule, it is recommended to be 1,000m²(gross) of convenience development and 2,000m²(gross) of comparison development. The criteria to be considered in the assessment of significant applications will include:
- i. Testing the proposal against the sequential approach and that other options have been considered;
 - ii. The retail impact on town and village centres, including cumulative impact;
 - iii. The baseline information and capacity/impact assessment is fit for purpose and transparent;
 - iv. There is demonstrable need for development;
 - v. The relationship of the application to any development plan allocation;
 - vi. Its contribution to town/village centre improvement;
 - vii. Its contribution to site and/or area regeneration;

- viii. The quality of access by all modes of transport and by foot and bicycle;
- ix. Its role in improving the competitiveness of the County and sub-areas of the County;
- x. Its role in sustaining rural communities;
- xi. The extent to which it is relevant to consider the imposition of restrictions on the range of goods permitted for sale; and
- xii. Any other development plan allocations.

6.45 If the retail proposal whether significant or not, accords with development plan policies and proposals in all material respects it should expect to meet with approval. In accordance with the RPG, in such instances, it should not be necessary for the applicant to provide additional supporting background studies. However, the onus is on an applicant to demonstrate convincingly that the proposal does comply closely with the development plan. Where there is doubt on any aspect of a planning application local authorities should require a detailed justification related to the matter that is questionable.

MONITORING

6.46 The County Retail Strategy has been founded on a sound basis of research, survey analysis and published statistics. It has been prepared during one of the most dynamic periods in the retail sector. Given that the facts and information change over time, there is a need therefore to ensure that:

- The Retail Strategy and its baseline are kept as up to date as possible
- There is a means of monitoring progress with the implementation of policies
- There is a mechanism that can enable change that is responsive to emerging trends and opportunities.

6.47 The above can be achieved by setting up a framework for regular monitoring and review. This should include:

- i Monitoring of expenditure and population forecasts. This is particularly important in the light of the pending adopted 2002 Census of Population and the NSS population forecasts;

- ii Floorspace data should be kept up to date through the monitoring of planning consents for both new retail floorspace and change of use. It could be adopted as a Development Control/Planning Office procedure;
- iii The County Retail Strategy should be reviewed after 3 years; and
- iv The household and shopper survey data should be up dated every five years.

APPENDIX A 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
- Books, newspapers and magazines
- Goods for personal care and goods not elsewhere classified

Convenience Retailing

This type of retailing includes:

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

Core Retail Area

Normally defined as the area including and immediate to the 'prime pitch'. That is the area that achieves the highest rentals, best yields, is highest in demand from operators, is overwhelmingly retail floorspace and has the highest footfall of shoppers.

Extant Planning Permissions

These are planning applications that have received full planning permission and are either yet to be built or under construction, but not yet trading.

Floorspace

Primarily we are interested in **net** floorspace, which 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.

Greater Dublin Area (GDA)

The GDA includes the four local authority areas of Dublin, along with the counties of Kildare, Meath and Wicklow.

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 to as *leakage*.

Sequential Approach

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 metres of the core retail area. 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. This is often referred to as *visitor expenditure*.

APPENDIX B
LIST OF SUBMISSIONS

List of submissions received in Relation to the South Tipperary County Retail Strategy		
Submission by	Developer/Client	Region/County/City
Mulcahy's (Clonmel) Ltd	Mulcahy's (Clonmel) Ltd	Clonmel
Development Planning Partnership and Cunnane, Stratton Reynolds. (Duplicate submissions made). Initial submission made on 7 June 2002 and duplicate submission made on 23 August 2002.	Tesco Ireland Ltd	Clonmel and County
Trios Resources Limited.	John Higgins of BEKAN Properties	Clonmel
RGDATA	RGDATA	Clonmel