

DRAFT RETAIL STRATEGY

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Kildare County Retail Strategy

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1.0 INTRODUCTION

In January 2009, Kildare County Council (the Council) commissioned **Declan Brassil & Company Limited** (the Consultants) to undertake a review of the *2005 Kildare Draft County Retail Strategy* (the 2005 Strategy) as the basis for the preparation of a County Retail Strategy, which included the towns of Naas and Athy, that would inform the Retail Chapters of the *Draft Kildare County Development Plan 2011 – 2017* and the *Draft Naas Town Development Plan 2011 – 2017*. The requirement for a new County Retail Strategy (the Strategy) responded to the need to ensure that the retail policies covering County Kildare (the County) were in accordance with all National, Regional and County planning frameworks and addressed the future shopping requirements of the different settlements in the County Retail Hierarchy over the period 2008 – 2016. The period 2008 – 2016 rather than the County Development Plan timeframe was adopted to ensure that, as was the case with the 2005 Strategy, the County Retail Strategy is consistent with and fully integrates with the *Retail Strategy for the Greater Dublin Area 2008 – 2016* (the 2008 GDA Retail Strategy).

1.1 The Report

This is the **2010 Kildare Draft County Retail Strategy**. It has been prepared following consultations and workshops with the Council.

1.2 Context

Although the 2005 Strategy was not adopted by the Council, it did form the basis of the Retail Chapters of the 2005 County and Naas Town Development Plans and was a document given much weight in planning applications and decisions. As such, it is referred to as the 2005 Strategy to differentiate it from the 2010 Kildare Draft County Retail Strategy (the Draft Strategy), which is the subject document. The context for the review and update of the 2005 Strategy is set by the following:

- i. The *2007 – 2013 National Development Plan* (NDP);
- ii. *Transport 21* – the Department of Transport's (DoT) 2005 capital investment framework under the NDP, which covers the period 2006 – 2015;
- iii. The 2005 Department of the Environment, Heritage and Local Government (DoEHLG) *Retail Planning Guidelines for Planning Authorities* (RPG), which are currently under review;
- iv. The Government launched *2002 National Spatial Strategy* (NSS), which is currently under review;
- v. The *2004 Regional Planning Guidelines Greater Dublin Area* (RPGGDA), which are currently being reviewed and updated;
- vi. The 2001 Dublin Transportation Office's (DTO) *Transportation Strategy A Platform for Change* which covered the period 2001 – 2016;
- vii. The 2008 GDA Retail Strategy, which was a review and update of the 2001 GDA Retail Strategy;
- viii. The *2005 Kildare Draft County Retail Strategy*;
- ix. The Retail Chapters of the *2005 – 2011 Kildare County Development Plan* and *Naas Town Development Plan*, both of which are under review;
- x. The *2006 – 2011 Athy Town Development Plan* and *2008 Athy Town Retail Strategy*, the preparation of which was a commitment in the Plan; and
- xi. The adopted and emerging Local Area Plans (LAPs) and other key planning framework and policy

documents, including Integrated Framework Plans for Land Use and Transportation (IFPLUTS), Action Area Plans (AAPs) and Masterplans.

Since the 2005 Strategy was completed, a number of other key data and guiding documents have been issued and important new influences have emerged that have implications for the retail planning and potential of the County which need to be taken due account of in the preparation of this Strategy. These are:

- The final results of the Central Statistics Office's (CSO) 2006 Census of Population and the population trends that have prevailed over the period between the 1996, 2002 and 2006 censuses.
- The January 2009 DoEHLG's revised population forecasts issued to regional and local authorities in the Department's Circular SP1/09 on *National Population Projections and Regional Population Targets 2010 to 2022*, the latter of which provides the projections for the review and update of the RPPGDA and other Regional Planning Guidelines around the country. Those to be applied in the County were provided to the Council by the Dublin and Mid East Regional Authorities in 2009.
- The Economic and Social Research Institute's (ESRI) 2008 – 2015 *Mid Term Review* and Winter 2008 *Quarterly Economic Outlook*.
- The 2006 CSO *County Incomes and Regional Gross Domestic Product (GDP) and Annual Services Inquiry (ASI)*.

In addition, the review is in compliance with the guidance in the 2005 Strategy which recommended it be undertaken following that of the GDA Retail Strategy to ensure that the County Retail Strategy remains consistent with the Regional Retail Strategy. Additionally, it reflects the Council's recognition that the retail sector is one of the most dynamic in the economy and there was a need to ensure retail planning policies and objectives and the baseline on which they were based remained up to date and valid. This position holds true whether it be during a period of significant economic growth or one of slowdown as both scenarios require to be recognised and planned for accordingly.

1.3 Terms of Reference

Taking due account of the above context, the terms of reference set and agreed for the preparation of the Strategy were:

- i. Review of forecasted population growth and distribution trends in accordance with the most recent DoEHLG and Dublin and Mid East Regional Authorities' data, using census data and any additional population data and forecasts held by the Council;
- ii. The commissioning and overseeing of shopper and household surveys throughout the County, to augment those undertaken in the preparation of the 2008 GDA Retail Strategy and 2008 Athy Town Retail Strategy and assist in the determination of income, expenditure and shopping patterns;
- iii. To collate and analyse data on floorspace information based on the 2005 Strategy and 2008 GDA Retail Strategy baselines and updated and reconciled with a review of permissions granted post 2001. The output analysis was set to identify the performance of the County as a whole but also its key centres in the County settlement and retail hierarchies to enable the determination of the appropriate strategic and settlement specific responses;
- iv. Review of the relevant policies and guidance in the 2008 GDA Retail Strategy, specifically in respect of the strategic framework for the new Strategy and in particular that of the County Retail Hierarchy;

- v. Provision of strategic policy guidance for incorporation in future Development Plans and LAPs in the County with the specific objective of improving the vitality and viability of the main centres in the County Retail Hierarchy;
- vi. Review of retail expenditure growth trends since 2001 and assessment of potential over the period to 2016 and beyond to 2022, the end year of the revised NSS;
- vii. Provision of an overview of significant development and market trends, including a comparative review of the effects and influences of retail developments in neighbouring counties;
- viii. Provision of a strategic vision for the sustainable development and expansion of the retail offer of the County, which takes due account of settlement strategy and public transport;
- ix. Identification of significant retail potential/opportunities in each of the County's main centres – generally those with a population of greater than 10,000. There was also a requirement to expand the number of health check appraisals from the nineteen in the 2005 Strategy to twenty four, with this including the combined four settlements of Ballitore, Crookstown, Moone and Timolin; and
- x. Provision of the assessment criteria under which large retail developments require to be assessed, taking due cognisance of those provided as guidance in both the RPG and 2008 GDA Retail Strategy.

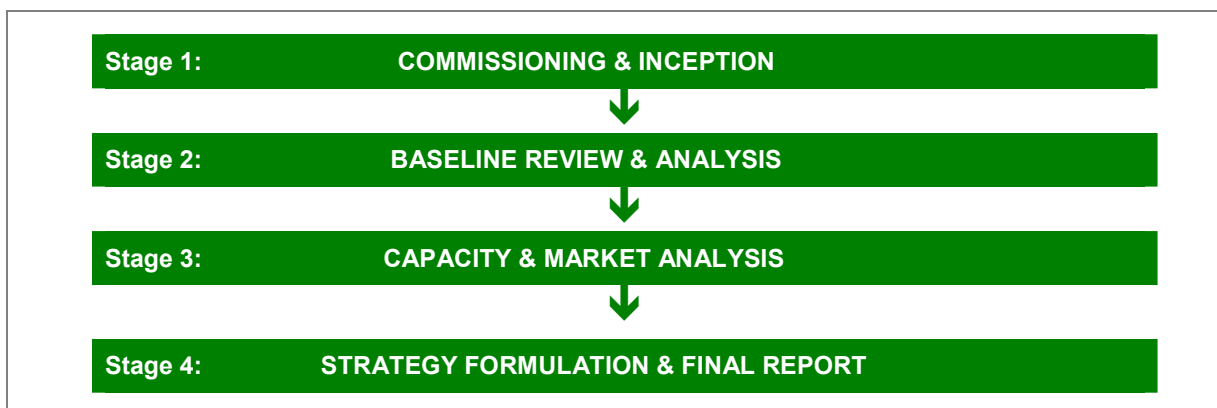
The terms of reference extended beyond the review of the 2005 Strategy and preparation of the new Strategy and included:

- Preparation of the Retail Chapters of the Draft County and Naas Town Development Plans
- Retail planning advice on pre-draft submissions to both Plans and emerging LAPs
- Advice on significant retail planning applications.

1.4 Study Approach

The study approach adopted in the review of the 2005 Strategy and preparation of the new Strategy has been developed to respond to the terms of reference set and agreed with the Council. In summary, it comprised four stages and is illustrated in Figure 1.1.

Figure 1.1 Study Approach



1.5 Objective of the Review

The objective of the review is to update the 2005 Strategy so that any changes in policy can be incorporated into the new County Retail Strategy and, subsequently the emerging County Development

Plan and Naas and Athy Development Plans. As with the 2005 Strategy, the new County Retail Strategy is required to meet the requirements of the RPG as set out under paragraph 36 of the guidelines as follows:

- *‘Confirmation of the retail hierarchy, the role of centres and the size of the main town centres*
- *Definition in the development plan of the boundaries of the Core Retail Area of town centres*
- *A broad assessment of the requirement for additional retail floorspace*
- *Strategic guidance on the location and scale of retail development*
- *Preparation of policies and action initiatives to encourage the improvement of town centres*
- *Identification of criteria for the assessment of retail developments.*

In addition, the County Retail Strategy is required to be in accordance with the strategic guidance for retail planning set out in the 2008 GDA Retail Strategy. The Regional Retail Strategy highlights that its primary purpose is to inform the statutory planning process and to ensure that adequate provision is made for retail development. The key objectives of the Regional Retail Strategy are set out under the *Retail Strategy Vision* in Part 6 of the strategy and are outlined below.

‘Sustainable development is one of the core principles underpinning current and future planning in Ireland. The planning system has a key role in facilitating and promoting sustainable patterns of development, including the creation of vital and viable town centres, which serve the surrounding developed areas which serve also proximate rural communities in a meaningful and practical way.

The central key objective arising from the overall vision is to promote the vitality and viability of town centres by:

- *planning for the growth and development of existing centres;*
- *promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in good environments which are accessible to all;*
- *integrating the provision of high quality retail with mixed use in towns and centres to create attractive, active places; and*
- *supporting the role of town centres as places to visit that have strong community and civic functions and role to their surrounding population.*

Other key objectives include:

- *enhancing consumer choice by making provision for a range of shopping, leisure and local services, which generally allow choice to meet the needs of the entire community, including partially excluded groups and new areas of population growth;*
- *supporting high quality, well designed efficient, competitive and innovative retail in town centres as an overarching objective in local/town plans, mixed with leisure, tourism, culture, business and other sectors; and*
- *improving accessibility, ensuring that existing and new development is, or will be, accessible and well served by a choice of means of transport and where possible within walking distance.’*

1.6 Structure of Report

The structure of the remainder of the report is as follows:

- **Section 2:** presents a summary of the baseline for the County Retail Strategy
- **Section 3:** provides the retail capacity assessment
- **Section 4:** sets out a review of the principles for the current assessment of retail potential in the different Sub Areas of the County and its key centres
- **Sections 5, 6 and 7:** summarise the current retail potential of the main centres in the three Sub Areas of the County and the implications for the County Retail Strategy
- **Section 8:** establishes the strategic framework for the County Retail Strategy
- **Section 9:** outlines the goals, objectives, strategic framework and policies and proposals of the County Retail Strategy.

The main text of the County Retail Strategy is supported by the following appendices:

- i. **Appendix A:** Glossary of Terms;
- ii. **Appendix B:** Manager's Report on the submissions received on the Strategy; and
- iii. **Appendix C:** Retail Impact Statement/Retail Impact Assessment Guidance Notes.

2.0 BASELINE FOR THE STRATEGY

Since the 2005 Strategy was prepared, there have been significant changes in the baseline and influences in respect of the strategic retail planning of the County. Those that are published have been highlighted in Section 1 but there is also a suite of important baseline and comparative information that has been collated and analysed in the preparation of the new County Retail Strategy which has important implications for the shaping of retail policy in the County to 2016 and beyond. This comprises the following:

- i. Recent trends in population growth;
- ii. Population forecasts – the foundations;
- iii. The significant changes in the retail floorspace profile and dynamics of the County; and
- iv. The shopping patterns that have emerged in response to the new retail landscape.

2.1 Recent Trends in Population Growth

The 2005 Strategy highlighted the significant growth in the County's population that had taken place over the period 1991 – 2002. In 2002, which was the most recent CSO Census of Population at the time, the County had a population of 163,944 which was 10.7% of that of the GDA and an increase from the 9.6% that prevailed at 1996. This pattern of increase has continued with the County growing to 186,335 in 2006 and its share of the GDA's population to 11.2%.

Set against this context, in the paragraphs that follow, the State, Regional and County level population changes between 1996 – 2006 are examined as these have important inputs and implications for the requirement for additional retail floorspace in the County to 2016 and beyond.

2.1.1 National & Regional Trends

Over the period 1991 – 2006, the State has witnessed unprecedented levels of population growth when set against trends over the 20th Century, growing by 25.2% from 3,325,719 to 4,239,848. The majority of this increase (16.9%) has taken place between 1996 – 2006 and has been fuelled by the driver of the national economy – the GDA, which accounted for 39.2% of the country's population in 2006. The GDA's population growth has largely been accommodated in the Mid East Region – the Hinterland Area of the Dublin conurbation, as housing shortages and prices enforced a substantial expansion of the Dublin commuter belt/zone of influence. While the GDA's overall population growth between 1996 – 2006 at 18.2% was not significantly above that of the State, the Mid East Region's population grew by 36.8% over the period – 10.0% above that of the next highest region (Midland Region at 22.4%).

Kildare with a population increase of 38.0%, after Meath (48.4%) and Fingal (43.1%) has had the fastest growing population in not only the GDA but the country as a whole between 1996 – 2006. This is illustrated in Table 2.1.

Table 2.1 State & GDA Population Change 1996 – 2006

Area	1996	2002	2006	% Change 1996-2002	% Change 2002-2006	% Change 1996-2006
State	3,626,087	3,917,203	4,239,848	8.0	8.2	16.9
Kildare	134,992	163,944	186,335	21.5	13.7	38.0
Meath	109,732	134,005	162,831	22.1	21.5	48.4
Wicklow	102,683	114,676	126,194	11.7	10.0	22.9
Mid East Region	347,407	412,625	475,360	18.8	15.2	36.8
Dublin City	481,854	495,781	506,211	2.9	2.1	5.0
Dún Laoghaire-Rathdown	189,999	191,792	194,038	0.9	1.2	2.1
Fingal	167,683	196,413	239,992	17.1	22.2	43.1
South Dublin	218,728	238,835	246,935	9.2	3.4	12.9
Dublin Region	1,058,264	1,122,821	1,187,176	6.1	5.7	12.2
GDA	1,405,671	1,535,446	1,662,536	9.2	8.3	18.3
Source: Central Statistics Office (CSO), Census of Population 1996, 2002 & 2006						

2.1.2 County Trends

While it has been recognised that the County would continue to witness population increase, the results of the 2006 Census have proven trends to exceed projections. This is evidenced by comparing the 2005 – 2011 County Housing Strategy forecasts for 2006 and 2011, which were 175,549 and 186,433 respectively, with the latter almost equating to the County's 186,335 population at 2006. Between 1996 – 2006, the County's population growth at 38.0% performed significantly above national (16.9%) and regional/GDA (18.2%) trends and was above that of the Mid East Region (36.8%). The factors underpinning the strong growth remain the same as those which prevailed at the time the 2005 Strategy was prepared. These were:

- The economic boom experienced across the country as a whole but particularly in those counties surrounding Dublin
- Increased levels of inward migration from the rest of the country due to the north and east central areas of the County's proximity and ease of access to the Dublin conurbation
- The greater affordability of housing in the County relieving the pressures and demands within the Dublin Region area, as illustrated by the high level of housing completions in the County
- An increase in employment opportunities in Kildare as a result of more new companies locating in the County and continued important Foreign Direct Investment (FDI)
- Kildare's location on the main transportation corridors to the south, south east, south west, west and north west of the country and the continuing strategic road and rail improvements.

It is recognised that the County has witnessed the effects of the economic slowdown, as evidenced by: a number of profile company closures; a significant 88.7% increase between August 2008 and August 2009 in numbers (17,999) on the Live Register – with the County accounting for 43.0% of those on the Live Register in the Mid East Region; falling house prices and either undeveloped or vacant housing schemes; and, to differing degrees the downturn in the performance of centres around the County. However, in view

of its strategic attributes, social and economic infrastructure and skilled population, the County is well positioned to regain the momentum that has prevailed until recently as the economy moves into recovery.

The population data for the key settlements for 1996, 2002 and 2006 are set out in Tables 2.2 and 2.3, together with the percentage increases that were experienced. The tables are ordered by size of population at the time of the 2006 Census. Table 2.2 presents the data on the nineteen main centres incorporated in the 2005 Strategy, for which population information is available for all of the period 1996 – 2006. These data were not available for the period for the additional centres identified by the Council. They were only available for 2002 – 2006 and in respect of certain centres, specifically Crookstown and Timolin, these were not able to be sourced at all. The information that is available for the additional centres provided in Table 2.3.

Table 2.2 Population Change in Main Centres 1996 – 2006

Centre	1996	2002	2006	% Change 1996-2002	% Change 2002-2006	% Change 1996-2006
Naas UD	14,074	18,288	20,044	29.9	9.6	42.4
Newbridge & Environs	13,363	16,739	18,520	25.3	10.6	38.6
Celbridge	12,289	16,016	17,262	30.3	7.8	40.5
Leixlip	13,451	15,016	14,676	11.6	-2.3	9.1
Maynooth	8,528	10,151	10,715	19.0	5.6	25.6
Athy	5,306	6,049	8,218	14.0	35.9	54.8
Kildare Town	4,278	5,694	7,538	33.1	32.4	76.2
Clane	3,126	4,417	4,968	41.3	12.5	58.9
Kilcock	1,825	2,740	4,100	50.1	49.6	124.0
Sallins	854	2,922	3,806	242.2	30.3	345.7
Monasterevin	2,302	2,583	3,017	12.2	16.8	31.0
Kilcullen	1,604	1,483	2,985	-7.5	101.3	86.1
Kill	1,711	2,246	2,510	31.3	11.8	46.7
Prosperous	814	1,523	1,939	87.1	27.3	138.2
Rathangan	1,190	1,811	1,718	52.2	-5.1	44.3
Johnstown	161	157	899	-2.5	472.6	458.4
Castledermot	733	726	887	-1.0	22.2	21.0
Ballymore – Eustace	719	786	725	9.3	-7.8	0.9
Straffan	341	332	439	-2.6	32.2	29.0
Total of Main Centres	86,669	109,679	124,966	26.5	13.9	44.2
Remainder of County	48,197	54,265	61,369	12.3	13.1	27.3
Total	134,992	163,944	186,335	21.4	13.7	38.0

Source: Central Statistics Office (CSO), Census of Population 1996, 2002 & 2006

Table 2.3 Additional Main Centres Population Change 1996 – 2006

Centre	1996	2002	2006	% Change 1996-2002	% Change 2002-2006	% Change 1996-2006
Athgarvan	n/a	n/a	1,300	n/a	n/a	n/a
Derrinturn	n/a	791	1,138	n/a	43.9	n/a
Ballitore	n/a	716	780	n/a	8.9	n/a
Allenwood	n/a	481	667	n/a	38.7	n/a
Kilteel	n/a	483	552	n/a	14.2	n/a
Moone	n/a	372	429	n/a	15.3	n/a
Total Secondary Centres		2,843	4,866			

Source: Central Statistics Office (CSO), Census of Population 1996, 2002 & 2006

The tables illustrate that all of the County's main centres experienced population growth between 1996 – 2006 but there was considerable variation in the strength of the growth in the different centres ranging from 0.9% in Ballymore-Eustace to 458.4% in Johnstown, accepting that the population figures in respect of both are small.

At 2006, approximately 70.0% of the County's population lived in its main centres, noting that full information is not available for all of the centres in Table 2.2. This was a small increase from the position at 2002. Some 43.6% lived in the largest centres of Naas, Newbridge, Celbridge, Leixlip and Maynooth, which was less than prevailed in 1996 (45.7%) and 2002 (46.5%). It confirms the importance of these centres in the County Settlement Hierarchy but also indicates that population growth is beginning to spread across the County.

Based on Table 2.2, just over 30.0% of the population lived in the main centres of the Central Sub Area of the County at 2006, which was a 3.0% increase since 1996. Of this 30.0%, nearly 21.0% lived in Naas and Newbridge, a position that has largely remained constant since 1996. In 2006, a further 25.0% lived in the main centres of the North East Sub Area, which was a slight decline from the position at both 1996 and 2002. Since 1996, the South Sub Area's main centres have witnessed a modest increase in their share of the County's population, increasing from 10.2% to 11.5% between 1996 – 2006, with this largely occurring post 2002.

2.2 Population Forecasts – the Foundations

To inform our analysis of the prospects for future population growth, and consequently the retail potential of the County, population projections were constructed. These are influenced by the recent trends set out above but also take account of other regional and national data and projections. As such, reflecting these factors, our population forecasts are constructed from a review of the following authoritative national, regional and local sources/projections and data:

- The results of the 2006 Census of Population;
- The National Spatial Strategy (NSS) projections to 2020;
- The Dublin and Mid East Regional Authorities 2007 *'Review and Update of Housing Needs in the GDA'*, which provides more up to date projections than those in the 2004 RPPGDA;
- The January 2009 DoEHLG's revised population forecasts issued to regional and local authorities in the Department's Circular SP1/09 on *National Population Projections and Regional Population Targets 2010 to 2022*, which has been noted provides the projections for the review and update of the RPPGDA and other Regional Planning Guidelines around the country; and

- v. The 2010 Draft RPGGDA population targets provided to GDA local authorities in 2009 by the Dublin and Mid East Regional Authorities.

Population projections are constructed on facts and trends but detailed demographic forecasting, especially over longer timescales, can only be viewed as a tool to inform decision making – history alone can validate whether predictions were right. This is a particular issue in dynamic and changing economies, such as has been the case in Ireland in recent years and continues to be so. As such, due regard has been given to changing economic conditions and, consequently, the range of relevant published population forecasts in the determination of what should be adopted as the basis for the construction of those appropriate to the County.

2.2.1 Population Projections

In compliance with the approaches adopted at both the national and regional levels, both low and high population projection scenarios were constructed for the County. These are set out in Table 2.4.

The **low growth scenario** is based on the Draft RPGGDA population targets provided to the Council in 2009 by the Dublin and Mid East Regional Authorities. These targets have also been incorporated in the Draft County Development Plan. The **high growth scenario** is trend based and derives from the growth rates experienced in the County between the last two censuses.

Table 2.4 Population Projection Estimates for County Kildare

Scenario	2006	2008	2016	2022
Low (1.92%)	186,335	195,106	234,422	252,640
High (3.28%)	186,335	198,743	218,921	312,085
Source: DBCL 2010				

2.3 Comparative Analysis of the Changing Retail Floorspace Profile

The 2008 GDA Retail Strategy contains floorspace information for the Region and County, which was based upon the 2001 GDA Retail Strategy floorspace survey and updated with built out and extant planning permission information provided by the GDA local authorities in 2007. The 2001 floorspace survey comprised surveying all towns and villages with a population greater than 1,000, based on the 1996 Census, although settlements with smaller populations were included if they were identified as growth centres in development plans. It was the floorspace audit incorporated in the 2005 Strategy.

A new floorspace survey was not part of the terms of reference for the preparation of the new County Retail Strategy. This noted, to ensure the current floorspace data for the main centres in the County were up to date and accurate, the 2001 baseline was updated to the March 2009 freeze date. This comprised:

- Review of the planning permission information provided by the Council in 2007 for the 2008 GDA Retail Strategy floorspace baseline up date.
- Collation of the new permissions that had been granted in the interim period between 2007 – 2009.
- Review of all permissions to discern what had been built out as these were what would be added to the County Retail Strategy existing floorspace baseline, with the remainder being included as commitments to be taken account of in the capacity assessment. The review was based on our knowledge of the different centres and what was found on the ground in the health checks of the main centres.

It is highlighted the approach adopted is that which has been applied by local authorities in the GDA and remainder of the country in the review and update of retail strategies.

The basis of the comparative review of what has changed in the County's retail landscape since the 2001 baseline was established and the current day is summarised in Tables 2.5 and 2.6. The tables break the information down by both retail category and by totals for the County and its key settlements and are structured by the centres in alphabetical order. As Johnstown and Straffan were below the 1,000 population threshold and the additional centres included in the County Retail Strategy were not surveyed in 2001, they are not included in the quantitative comparative assessment. This also applies to the new centres included in the County Retail Strategy. It is also highlighted that as a new floorspace survey was not undertaken then there is no quantitative information on the levels of vacant floorspace in each of the centres in the 2009 baseline floorspace audit. However, the health checks of the centres in Sections 5, 6 and 7 provide a qualitative appraisal of vacancy levels which includes information on the number of vacant units. As such, to enable a like for like 2001 and 2009 comparative assessment, the 2001 baseline excludes vacant floorspace.

Table 2.5 Net Retail Floorspace Breakdown Trading in 2001 (m²)

Centre	Convenience	Comparison	Retail W'housing	Total
Athy	3,362	4,080	-	7,442
Ballymore-Eustace	439	52	135	626
Castledermot	1,174	35	-	1,209
Celbridge	2,292	1,882	-	4,173
Clane	281	487	-	768
Kilcock	660	555	300	1,515
Kilcullen	630	549		1,179
Kildare	715	1,200	1,110	3,025
Kill	504	111		615
Leixlip	2,424	1,656	400	4,480
Maynooth	3,077	2,655		5,732
Monasterevin	478	1,292		1,770
Naas	4,944	5,210		10,154
Newbridge	4,347	8,751	8,437	21,535
Prosperous	879	323		1,202
Rathangan	400	352		752
Sallins	133	460	600	1,193
Total	26,737	29,649	10,982	67,368

Source: 2005 Kildare Draft County Retail Strategy

Table 2.6 Net Retail Floorspace Breakdown Trading in 2009 (m²)

Athy	4,391	4,337	-	8,728
Ballymore-Eustace	439	52	135	626
Castledermot	1,174	35	-	1,209
Celbridge	3,950	2,790	-	6,740
Clane	2,805	785	-	3,590
Kilcock	660	555	300	1,515
Kilcullen	1,106	699		1,805
Kildare	2,610	10,314	1,110	14,034
Kill	504	111		615
Leixlip	3,453	1,913	400	5,766
Maynooth	8,732	14,266		22,998
Monasterevin	1,956	1,662		3,618
Naas	10,008	17,172	21,416	48,596
Newbridge	7,236	24,899	8,437	40,572
Prosperous	1,279	3,826		5,105
Rathangan	600	452		1,052
Sallins	2,477	2,742	600	5,819
Total	53,379	86,610	32,398	172,387
Source: DBCL 2010				

The tables enable a comparative analysis of changes in floorspace quantum and other patterns over the period since 2001. This is summarised under the following headings in the paragraphs below:

- i. Overall trends;
- ii. Patterns by market sector; and
- iii. Patterns at the main centre level.

2.3.1 Overall Trends

At 2001, the County's total net '*trading*' retail floorspace, excluding vacancies which only accounted for 5.1% of total estimated floorspace, was **67,368m²**. By the time of the end of March 2009 freeze date for baseline information, it totalled – excluding vacancies – an estimated **172,387m²** net. This figure includes the **9,688m²** of built and under construction schemes in Naas and Sallins. The increase represented that the County's retail floorspace had increased by approximately two and a half times between 2001 and 2009. It is a very significant increase and one that responds to the deficits in provision at 2001 combined with: the buoyancy of the economy; increased consumer demand/affluence; and, market/development interest in the County.

2.3.2 Patterns by Market Sector

The 2005 Strategy identified that the **67,368m²** of the County's net retail floorspace at 2001 comprised: 39.7% (**26,737m²**) of convenience, 44.0% (**29,649m²**) comparison and 16.3% (**10,982m²**) bulky goods floorspace. By March 2009, the profile of the County's **172,387m²** total floorspace was 30.9% (**53,379m²**) convenience, 50.2% comparison (**86,610m²**) and 18.8% (**32,398m²**) bulky goods. The comparative figures indicate that convenience floorspace has approximately doubled, mainstream comparison increased between two and threefold and bulky goods significantly increased almost threefold.

The increase in the quantum and profile of the County's comparison floorspace (both mainstream comparison and bulky goods floorspace) is important as this is the sector that provides the foundation for competitiveness and attraction within the wider GDA and national retail economy, given that convenience shopping is generally done locally. Comparison floorspace, has increased by almost 10.0% from 60.3% to 69.0% as the share of total retail floorspace over the period 2001 – 2009. The significant improvement is reflected in the substantial decrease in comparison expenditure leakage of people living in the County and the parallel increase in spend by visitors from outside of the County shopping in Kildare. This is illustrated by the comparative analysis of household and shopper surveys, the key findings of which are headlined later in the section. The increased quantum can be attributed to a number of key schemes, namely: the Whitewater Shopping Centre in Newbridge; the Manor Mills Shopping Centre and Tesco anchored Town Centre Expansion Area scheme in Maynooth; the Kildare Village Outlet Centre (KVOC); and, the two new retail parks in Naas, although the Corban's Lane/Naas Shopping Centre scheme which is currently under construction also forms an important part of the total increase.

2.3.3 Patterns at the Main Centre Level

Comparative analysis of Tables 2.5 and 2.6 indicate that, based on the significant changes in the quantum of retail floorspace in the County between 2001 and the current update, there have been changes in the profiles and importance of different centres in the County Retail Hierarchy but overall not necessarily the dynamics and importance of the centres in their role and attraction in the hierarchy. These issues and considerations are examined at the centre level in the health checks in Sections 5, 6 and 7 of the Strategy. The main findings of the settlement level comparative assessment are summarised below:

- Some 51.7% of the County's total retail floorspace is located in Naas and Newbridge, up from 47.0% in 2001. This pattern of concentration is reinforced when the next largest centres (Maynooth and Kildare Town) are added to the equation with the four largest centres having 73.2% of total floorspace against 66.6% in 2001. The pattern reflects the introduction of the key schemes listed above and generally new retail development following the guidance of the County Retail Hierarchy.
- **Naas:** had a total net trading floorspace at 2001 of **10,154m²**, which was some 47.1% of that of Newbridge. At 2009, Naas' total net floorspace (inclusive of the Corban's Lane/Naas Shopping Centre development) is **48,596m²**, resulting in the town becoming not only the largest settlement in the County but also the centre with the greatest quantum of retail floorspace, elevating itself above Newbridge. This is largely as a result of the substantial improvement in Naas' quantum of retail park/bulky goods floorspace rather than its middle and higher order comparison shopping offer. Bulky goods floorspace currently accounts for 44.0% of Naas' total retail offer. While this is very important in the retail offer of Kildare, it has generally a County based market given the comparable and competing offers in neighbouring counties. This in contrast to Newbridge, which while it has dropped in the quantitative league, remains the County's most important mainstream comparison shopping destination.
- **Newbridge:** had a total trading floorspace of **21,535m²** at 2001 and was the largest retail centre in the County. This remained the case until the Naas' Corban's Lane/Naas Shopping Centre scheme emerged. Currently, Newbridge has a total net retail floorspace of **40,572m²**, which represents over an 88.0% increase since 2001. Although the town's share of the County's retail floorspace has decreased over the interim period from 31.9% to 23.5%, what has significantly improved is the quality and quantum of Newbridge's mainstream comparison offer which has made the town one of the most important shopping destinations in the GDA and further a field.
- Below Naas and Newbridge, **Maynooth** has emerged as the third largest centre in the County, being previously the fourth largest. The town's total current floorspace is **22,988m²**, which is a fourfold increase on that at 2001. **Kildare Town**, in view of the KVOC, with a total floorspace of **14,034m²** has become the fourth largest centre which is up from seventh position in 2001. As a result of the increases in both Maynooth and Kildare Town, Athy has now the fifth largest quantum

of floorspace (8,728m²) against having the third in 2001, this is despite the keen market interest in new development in the town.

2.4 Shopping Patterns – the Response to the Changed Retail Landscape

The 2005 Strategy was informed by the household and shopper surveys conducted as part of the preparation of the 2001 GDA Retail Strategy. These comprised a total of **263** on street face to face shopper interviews in Naas Town Centre – the only centre in the County where a shopper survey was undertaken – and a **441** household telephone survey of residents in the County. Since then, the following surveys have been conducted that are relevant to the preparation of the new County Retail Strategy:

- i. **2008 GDA Retail Strategy:** shopper surveys were conducted in Dublin City Centre and Dundrum Town Centre but no other centres in the remainder of the GDA. The shopper pattern information was derived from household telephone surveys that included and extended well beyond the GDA as part of the approach to determine inflows and outflows of retail expenditure. Some **485** household interviews on shopping patterns/expenditure were conducted across the County as part of the approach adopted; and
- ii. **2006 Athy Town Development Plan:** as part of the preparation of the Plan, Athy Town Council commissioned shopper and household surveys of **165** shoppers and **101** residents in the town's defined catchment area.

While it was accepted that the GDA Retail Strategy household survey and the Athy surveys had considerable weight and importance, the terms of reference for the preparation of the County Retail Strategy sought a more detailed assessment of shopper and household shopping patterns. This comprised the Consultants commissioning **Direction Research Group Limited** to undertake the following:

- A **571** household telephone survey of residents across the County.
- A **500** shopper survey conducted in Naas (200), Newbridge (200) and Maynooth (100), the main centres in the Central and North East Sub Areas of the County. These were set to augment the findings of the 2005 Athy Town surveys which provided an insight to shopper expenditure patterns in the South Sub Area of the County. The shopper surveys completed exceeded the brief and totalled **544**.

The findings from all of the surveys have been taken into account in the preparation of the County Retail Strategy.

Although such surveys provide a wealth of information to inform the content of retail strategies, of particular importance in respect of the potential and capacity for additional retail floorspace is the information derived in respect of expenditure patterns:

- i. **Market Share:** the proportion of retail expenditure spent and retained in the County by people living in the County; and
- ii. **Trade Draw:** the proportion of turnover in retail outlets in Kildare attributable to people living outside the County.

In addition the surveys provide an indication of:

- Where people shop
- Where people come from to shop in the County
- Travel preferences

- Other factors that may influence shopping patterns.

2.4.1 2005 Strategy, 2008 GDA Retail Strategy & Athy Town Development Plan Survey Headlines

Surveys reflect shopping patterns at a point in time and through the suite of surveys that have been undertaken then there is good time series information on the changes that have taken place since the 2001 GDA Retail Strategy surveys were undertaken. These all serve to inform the shape of the new County Retail Strategy.

2.4.1.1 2005 Strategy

The 2001 GDA Retail Strategy identified that the County was relatively self sufficient in convenience shopping but the outflow of comparison expenditure was high, although only a little higher than that for other local authority areas outside of Dublin City Council's administrative area. It highlighted that much of the comparison expenditure leakage went to Dublin City Centre, Fingal (Blanchardstown) and South Dublin (Liffey Valley). These findings are reflected in the following expenditure outflow and inflow figures:

- Convenience:** 8.0% expenditure leakage and 9.0% inflow; and
- Comparison:** 47.0% expenditure leakage and 6.0% inflow.

The 2001 findings were reviewed in the preparation of the 2005 Strategy which recognised that, in the interim period between 2001 – 2005, there had been retail developments around the GDA that would have influenced shopping patterns. It identified that at that time in the County new floorspace largely comprised additional convenience stores and there had been no substantial high street or bulky goods comparison developments built or open for trading. The 2005 Strategy highlighted that this was set to change with the delivery of the higher order Irish Ropes scheme (Whitewater Shopping Centre), Naas District Centre (Monread Road District Centre) and the retail parks around Naas. It also highlighted that there was considerable market interest in major retail schemes in centres around the County that would have the potential to greatly enhance the attraction of Kildare for shopping for residents and visitors alike. The 2005 Strategy assessed that, based on information on retail developments within and outside of the County, it was reasonable to assume that at 2005 the following patterns would prevail:

- *'Convenience expenditure retention will remain high and inflows will still be low. It is likely that there has been some erosion of the level of retention due to new stores in neighbouring counties both in the GDA and in neighbouring counties to the south of the County, such as the improvement in the convenience offer of Carlow Town.'*
- *The large outflow of comparison expenditure from the County that was found from the household surveys is likely to have been reinforced and increased and inflows will remain low.*
- *The enhancement of bulky goods floorspace around the major suburban shopping centres of Blanchardstown, Liffey Valley and Tallaght and in Mullingar and Carlow Town will have increased the outflow of bulky goods expenditure from the County with very limited counter balancing inflows.'*

2.4.1.2 2008 GDA Retail Strategy

The 2008 GDA Retail Strategy's survey analysis identified the following key findings in respect of Kildare:

- Convenience:** unlike comparison shopping, most available convenience goods expenditure is spent locally. All three counties in the Mid East Region, however, leak more convenience goods spend than they attract highlighting an immediate need for increased convenience floorspace to reduce the need to travel long distances by car for essential shopping;

- ii. **Comparison:** all three Mid East Region counties are major net exporters of comparison goods expenditure, mainly into the Dublin Region. Kildare, however, now retains a higher percentage of expenditure than 2001. South Dublin was identified as having less percentage comparison expenditure retention than Kildare. In general, the 2008 GDA Retail Strategy identified that the extremely low level of retained expenditure in the Mid East counties must be addressed as part of the strategy; and
- iii. **Centre Dominance:** Naas/Newbridge/Kilcullen attract comparison trade from both within its immediate catchment and from surrounding zones not immediately proximate and in fact across a large area. Its core catchment area covers: North East Kildare to the north; to the Dublin Region boundary to the north east; Kildare Town/Monasterevin to the south west; and, into Offaly to the west. The 'centre's' primary catchment extends across South Kildare and the Blessington area, with its secondary catchment extending across Laois and Offaly.

The Regional Retail Strategy derives the following outflow and inflow expenditure figures:

- **Convenience:** 21.1% expenditure leakage and 12.0% inflow
- **Comparison:** 39.0% expenditure leakage and 27.0% inflow.

2.4.1.3 2008 Athy Town Retail Strategy

The key findings from the 2006 Athy Town Development Plan surveys were:

- i. Athy is performing its role as a Sub County Town Centre in the County Retail Hierarchy but there is scope for improvement;
- ii. The town displays a very high level of convenience expenditure retention for both main food (76%) and top up (85%) shopping;
- iii. Carlow is identified as the main competing centre and the national road improvements, additional convenience floorspace in the pipeline at the time along with the ease of access to the main food stores in Carlow Town Centre are likely to encourage an increase in expenditure leakage to Carlow if there are no improvements to provision in Athy;
- iv. Carlow, Newbridge, Portlaoise and Kilkenny, in descending order of importance, are identified as the other competing centres for convenience shopping;
- v. Athy is not a strong comparison centre, with nearly 70% of resident's expenditure in the catchment area going elsewhere for clothing and footwear and 50% travelling elsewhere for bulky goods shopping; and
- vi. Carlow is identified as the main alternative for both clothing and footwear and bulky goods shopping, with Newbridge being the second most popular alternative location for comparison shopping. Other competing centres, in descending order of importance, were locations within Dublin, Portlaoise and Kilkenny.

2.4.2 Household Survey: Key Findings

The County Retail Strategy household survey consisted of a telephone survey carried out in May and June 2009. There were a total of **571** respondents consisting of 22.0% male and 78.0% female, the majority of which were in the 35 to 54 year age bracket. The paragraphs that follow highlight the main findings that have emerged from the survey.

The key questions asked in the household survey relate to the following topics:

- Main Food Shopping
- Top Up Shopping
- Bulky Goods Shopping
- Clothing and Footwear Shopping
- Internet Shopping.

Main Food Shopping: was undertaken by the majority of respondents once a week, the vast majority of those travelling by car (86.0%). Only 2.5% of respondents stated that they did their main food shopping outside of the County, with alternative locations including Dublin City, Liffey Valley, Wicklow County, Carlow Town, Edenderry, Enniskillen and Portlaoise.

Top Up Shopping: this was done more frequently than main food shopping, with 69.0% undertaking the trip by private car. Less than 2.0% of respondents indicated that they did their top up shopping outside of the County with Dublin, Blessington and Carlow Town being named alternative locations.

Clothing and Footwear Shopping: was generally undertaken once a month or less and in the majority of cases (80.0%) by private car. Some 40.0% of respondents stated that they did this type of shopping outside of the County with key destinations being Dublin City Centre, Liffey Valley, Carlow Town and to a lesser extent Portlaoise by people living in the south of Kildare.

Bulky Goods Shopping: the majority of these trips were by private car with nearly 21.0% travelling out of the County for this type of shopping. The main alternative destinations were Liffey Valley (8.0%), Dublin City (3.5%), Carlow Town (3.1%) and Blanchardstown (1.9%).

Internet Shopping: has increased in importance in shopping expenditure patterns with nearly 78.0% of respondents indicating they had shopped on the internet in the last six months.

2.4.2.1 Actual Levels of Expenditure (Market Share)

Table 2.7 provides a percentage breakdown of total convenience and comparison spend both inside and outside the County. It highlights that some 97.8% and 67.0% of total convenience and comparison expenditure is spent at locations within the county. These reflect significantly high levels of **market share** i.e. retention of expenditure in the convenience category and rather lower market share in comparison category. Although the latter is lower, it is a 14.0% improvement on the position at 2001 and is, therefore, significant and consistent with the findings of the 2008 GDA Retail Strategy survey, albeit the percentage figures differ.

Table 2.7 Level of Expenditure

Location	Convenience (%)	Comparison (%)
Within County	97.8	67.0
Outside County	2.2	33.0
Total	100	100
Source: Direct Research Group Household Survey May & June 2009		

In Table 2.8, the different levels of market share for the different categories of shopping are further examined. This analysis demonstrates the high level of convenience expenditure market share and the higher level of mainstream comparison expenditure leakage against that of bulky goods shopping.

Table 2.8 Level of Expenditure by Shopping Category

Location	Convenience (%)		Comparison (%)	
	Main Food	Top Up	Clothing & Footwear	Bulky Goods
Within Survey Study Area	97.5	98.2	60.0	74.6
Outside Survey Study Area	2.5	1.8	40.0	25.4
Total	100	100	100	100
Source: Direct Research Group Household Survey May & June 2009				

2.4.3 Shopper Survey: Key Findings

As has been highlighted, **544** on street face to face shopper interview surveys were conducted in March 2009 in the County's three largest retail centres – Naas, Newbridge and Maynooth, at three locations within each town centre. The key questions asked in the surveys included the following topics:

- i. Shopper origin;
- ii. Reasons for visiting the shopping location;
- iii. Mode of transport;
- iv. Frequency of visits to the shopping location;
- v. Principle attractions of the main towns;
- vi. Principle improvements that might be made to the shopping location; and
- vii. Actual levels of expenditure (trade draw).

Shopper Origin: in respect of the three towns, 27.0% in Maynooth came from the area, 57.0% of those in Naas and 42.0% of those in Newbridge.

Reasons for Visiting the Main Centres: overall were: main weekly grocery shop (24.0%); work (12.0%); other grocery shopping and women's fashion and footwear (9.0%); meeting friends or family (6.0%); and, meals out or browsing a further 4.0% each.

Mode of Transport: across the three centres, travelling by car was by far the most common mode of transport (73.0%) followed by walking (16.0%) and the use of the bus (8.0%). Cycling is not a major feature in the travel patterns of those visiting the three town centres, with only (1.0%) of respondents citing this as how they came to the town centre.

Frequency of Visits to the Shopping Location: respondents were also asked if they were visiting the centre more frequently than a year previously. Overall: 21.0% were more frequent visitors; 67.0% said they were visiting the same amount; 7.0% were visiting less frequently; and, a further 5.0% indicated that they didn't know. This bias toward more frequent shopping trips, rather than less frequently is favourable and evident across each of the towns.

Principle Attractions of the Main Towns: in addition to shopping, respondents were asked what other reasons brought them to the town. Browsing in all centres accounted for a high proportion of other reasons for visiting the centre at 19.0% in Maynooth; 11.0% in Naas and 21.0% in Newbridge. Other key findings were:

- *Principal Attraction:* the main reason for visiting the centres was *proximity to home* which had an average of 45.0% of respondents.
- *Eating Out:* some 28.0% of respondents in Maynooth stated that eating out was what they did in addition to their main reason for visiting the centre that day. This falls to 8.0% and 10.0%

respectively for Naas and Newbridge.

- *Bulky Goods Shopping:* not surprisingly, Naas was the predominant centre with 6.0% stating it was the main reason for visiting the town and 10.0% that it was the additional purpose of their trip. It was not identified as the main purpose of the trip by respondents in Maynooth and Newbridge.
- *Car Parking:* some 13.0% of respondents in Maynooth identified that lack of parking was an issue against 6.0% in both Naas and Newbridge. Paying for parking was, also indicated by 6.0% and 4.0% in Naas and Newbridge respectively.

Respondents were asked to provide their views on the choice of different types of shopping available in each centre. This is summarised in Table 2.9.

Table 2.9 Percentage Citing 'Good Choice' of Certain Shops as Attraction of Centre

Type of Shop	Maynooth (%)	Naas (%)	Newbridge (%)	Total (%)
Clothing & Footwear	2.0	2.0	13.0	6.0
Designer	-	3.0	3.0	2.0
Cheap Discount	-	2.0	2.0	2.0
Department Store	2.0	2.0	9.0	5.0

Source: Direct Research Group Shopper Survey March 2009

The table reveals a very key set of figures, namely Newbridge is by far the only centre with a good range of choice although it is surprising that it did not rate higher under clothing and footwear, designer and department stores given Whitewater Shopping Centre's retail offer. Both Maynooth and Naas are scoring very low in terms of the attraction for choice in all of the types of shopping examined under this question, with respondents also highlighting the need for improvement in the quality and quantum in Maynooth (3.0%) and Naas (12.0%).

Principal Improvements that Might be Made to the Shopping Location: these can be summarised as: ease of traffic congestion; improved car access; shopping offer; and, other facilities.

2.4.3.1 Actual Levels of Expenditure (Trade Draw)

The large majority of respondents (84.3%) were from the County while others came from: Dublin (5.6%); Meath (4.8%); Wicklow (2.0%); Longford (1.2%); and, less than 0.5% from Carlow, Louth, Laois, Cork and further afield, including Scotland. Table 2.10 summarises the proportion of actual spend by shoppers on convenience and comparison goods and other categories. It should be noted that when the mainstream comparison and bulky goods comparison expenditure figures are combined and considered with the findings of the Athy survey, they result in a trade draw of 15.0% and this is the figure used in the capacity assessment. It represents a 9.0% increase since 2001 and although the figures differ from the 2008 GDA Retail Strategy findings, they confirm that the County is increasing its attraction as a comparison shopping destination.

Table 2.10 Shopper Spend Proportion in each Shopping Category (%)

Origin	Convenience (Main Food)	Comparison (Clothes/Footwear)	Bulky Goods	Other (Cinema etc)	Total
Non-residents	5.7	24.0	14.5	19.5	12.1
County Residents	94.3	76.0	85.5	80.5	87.9
Total	100	100	100	100	100

Source: Direct Research Group Shopper Survey March 2009

The table illustrates that some 5.7% of convenience shopping, 24.0% of mainstream comparison and 14.5% of bulky goods expenditure was by respondents who came from outside of the County. Of importance is also the high level (19.5%) that came to the County and spent on going to the cinema, eating out, visiting a bar or other visitor activities.

3.0 BROAD ASSESSMENT OF ADDITIONAL FLOORSPACE

The 2005 Strategy covered the period 2001 – 2011 and was aligned in its capacity assessment to the 2001 GDA Retail Strategy rather than the County Development Plan timeframe. As has been highlighted in Section 1, to ensure that the County Retail Strategy is consistent with and fully integrates with the Regional Retail Strategy, the timeframe of 2008 – 2016 has been adopted rather than that of the 2011 – 2017 County or Naas Town Development Plans. This noted, this Retail Strategy has informed the preparation of both of these Plans. Additionally, the assessment looks forward to 2022 which is the end year of the emerging NSS and RGGDA respectively, the reviews of both are currently underway. In respect of looking beyond the 2016 time horizon of the current Regional Retail Strategy, this enables a longer term look at the retail planning and potential in the County to be taken, which is consistent with the approaches adopted in the emerging NSS and RGGDA. It also responds to the fact that if new major retail applications are not at an advanced stage in the planning process or lodged then they will not be capturing expenditure potential/capacity until post 2016 and, thus, it is appropriate to provide guidance on future retail floorspace need and potential.

One of the key requirements of the RPG is that retail strategies should provide a broad assessment of the additional retail floorspace needed in counties over the lifetime of their strategies. As part of the preparation of the assessment, a review was undertaken of those presented in the 2005 Strategy and 2008 GDA Retail Strategy. In addition, account has been taken of the changes to the population and population forecasts, updated information on expenditure, retail floorspace and the findings of the household and shopper surveys summarised in Section 2 plus the position in respect of extant planning permissions.

3.1 Principles & Objectives

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 County Retail Strategy and beyond the Strategy timescale to 2022. Consideration of capacity up to 2022 is for the following reasons:

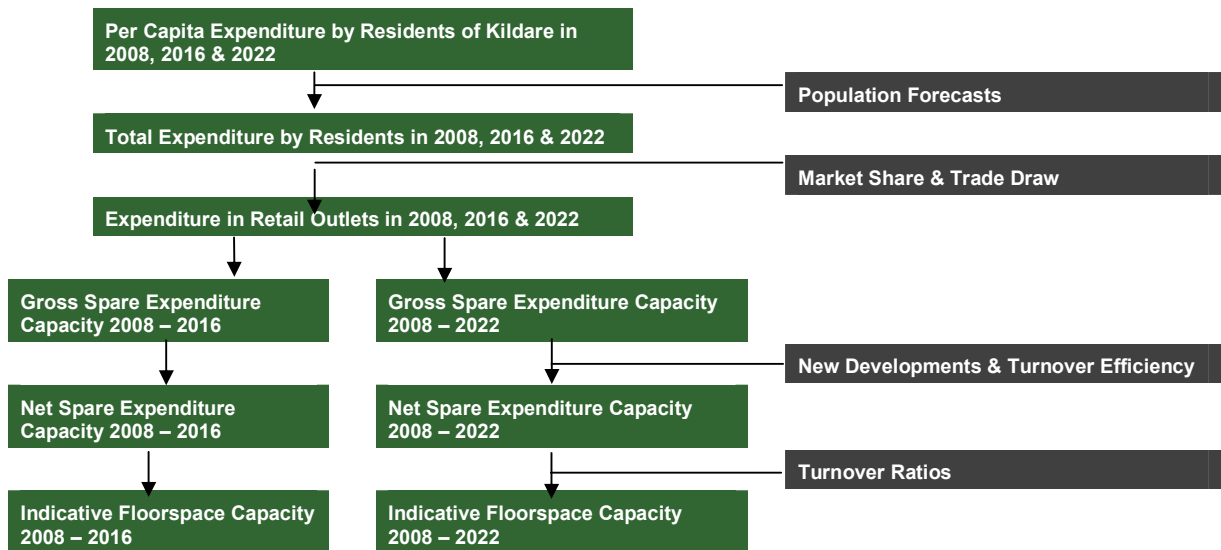
- i. The recognition that large retail developments generally take a long time to emerge and be delivered; and
- ii. The twenty year time period envisaged in the 2008 GDA Retail Strategy for the delivery of the designated Metropolitan Level 2 Major Town Centre at Leixlip (including Collinstown), in North East Kildare.

In addition to the above considerations, the assessment identifies the type and amount of additional floorspace that will be required to accommodate the additional expenditure that is available over the period of the County Retail Strategy. At the same time, allowances must be made for any:

- New retail outlets that are planned to come on stream, identified by current undeveloped planning permissions
- Increases in sales in existing stores due to improvements in turnover efficiency
- Expenditure in alternative forms of retailing – this includes internet shopping, mail order sales and market stalls. It excludes wholesale retail and car sales outlets, as laid down by the RPG.

Figure 3.1 provides an overview of the process used in undertaking the capacity assessment.

Figure 3.1 Capacity Assessment Methodology



The key inputs and outputs of the assessment are the derivation of the following:

- i. **Step 1:** Population and Estimates;
- ii. **Step 2:** Turnover Estimates;
- iii. **Step 3:** Turnover Ratios;
- iv. **Step 4:** Gross Additional Expenditure Potential;
- v. **Step 5:** Future Sources of Retail Sales; and
- vi. **Step 6:** Capacity Potential.

3.2 Step 1 – Population & Expenditure Estimates

The first step is to calculate the total amount of expenditure on convenience and comparison goods by the resident population of the County over the periods up to 2022. It is important to recognise that since the 2008 GDA Retail Strategy was prepared there has been a significant downturn in the economy which requires to be given due weight and cognisance in the capacity assessment. The assessment, therefore, incorporates the latest authoritative population and economic forecasts which reflect/respond to the very changed economic conditions that prevailed at the 31 March 2009 freeze date for baseline information. At this point in time, these forecasts were provided by:

- The January 2009 DoEHLG revised population forecasts issued to regional and local authorities in the Department's Circular SP1/09 on *National Population Projections and Regional Population Targets 2010 to 2022*. This circular provides the national and regional projections for the update of the NSS and Regional Planning Guidelines across the country.
- The population targets for the County, based on the above, provided to the Council by the Dublin and Mid East Regional Authorities.
- The per capita expenditure estimates for comparison and convenience goods are derived from the 2006 CSO ASI and Regional Incomes and County GDP data published in November 2008 and February 2009 respectively. This is the latest year for which disaggregated information is available.

- The economic forecasts provided by the Winter 2008 ESRI *Quarterly Economic Outlook*.

In the interim period since the March 2009 freeze date for baseline information, the ESRI has published more recent *Quarterly Economic Outlooks*. Although these indicate a more pessimistic economic performance in the short term, this is set to be redressed by the end of/post 2010 when growth will again set in, albeit at lesser levels than prevailed pre-2007 but are consistent with those projected in the Winter 2008 *Quarterly Economic Outlook*.

It is recognised in the NSS and RPPGDA, which both are important baseline references for the 2008 GDA Retail Strategy, that the economy is dynamic and that, over the timescale of both the Regional and County Retail Strategies, its performance potentially could fluctuate both positively and negatively. However, a baseline requires to be set and for the purposes of the new County Retail Strategy the freeze date is confirmed as the end of March 2009 and the potential for fluctuations accommodated in low and high population growth scenarios. This approach is consistent with that adopted in the 2008 GDA Retail Strategy.

Based on the above, Table 3.1 provides the per capita expenditure estimates for convenience and comparison goods and projects them forward based on recent personal consumption growth estimates. The figures take into account the effect of internet shopping. The estimated per capita levels of expenditure are multiplied by the population forecasts set out in Section 2 to enable the expenditure potential of the County's resident population to be derived.

Table 3.1 Expenditure by the Resident Population (2006 prices, €m)

Year	Per Capita Expenditure (€m)		Catchment Population		Convenience (€m)		Comparison (€m)	
	Conv (€)	Comp (€)	Low	High	Low	High	Low	High
2008	3,990	4,424	195,106	198,743	778.5	793.0	863.1	879.2
2016	4,451	5,003	234,422	257,206	1,043.4	1,144.8	1,172.8	1,286.8
2022	4,866	6,112	252,640	312,085	1,229.3	1,518.6	1,544.1	1,907.5
Source: Derived from CSO Annual Services Inquiry 2006, County Incomes and Regional GDP, 2000, 2006 and ESRI bulletins. Population derived from Draft RPPGDA population targets and observed trends.								

The table shows that comparison expenditure growth is increasing at a faster rate than that of convenience. It is, however, at a slower pace than previously as a result of the effects of the economic slowdown on comparison spend growth. The faster growth in comparison expenditure above that of convenience is a trend that is evident across the country and reflects a maturing retail economy, even in a time of economic slowdown. It indicates the retail economy is converging with longer established trends across the more developed economies in Europe.

The analysis of retail expenditure is only concerned with expenditure that occurs within retail outlets i.e. that related to retail floorspace only. Therefore, as has been noted, the above figures discount shopping not occurring within a retail outlet e.g. via the internet or telephone.

3.3 Step 2 – Turnover Estimates

As the findings from the suite of household and shopper surveys reveal, not all of residents' expenditure is retained in the County but there are also important inflows of spend from people living outside of Kildare. The balance of this supports the current turnover of retail outlets in the County. This can be derived by applying estimates of percentage outflows and inflows of spend. These are defined as follows:

- i. **Market Share:** the proportion of total expenditure by the County's population that is retained in the area; and
- ii. **Trade Draw:** the proportion of total turnover that is due to persons living outside of the County.

Based on a review of the 2006 Athy and 2008 GDA Retail Strategy consumer surveys and 2009 County Retail Strategy household and shopper survey findings, the following market share and trade draw estimates were derived. In the 2005 Strategy, these were assumed to remain constant over the period 2001 – 2011, reflecting that all of the counties in the GDA would be improving their retail offers and would effectively counteract any improvement in their market share and trade draw. This is the principle that has been retained in the capacity assessment in the new County Retail Strategy.

3.3.1 Convenience Shopping Expenditure Patterns

The 2009 household and shopper surveys revealed the following convenience shopping expenditure patterns:

- **Market Share:** some 97.8% of convenience expenditure was retained in the County – only 2.2% of spend was leaking elsewhere. This is a 5.8% increase in convenience market share to that applied in the 2005 Strategy, which was derived from the figures in the 2001 GDA Retail Strategy. This level of retention is exceptionally high and very positive. It is above the levels identified in the 2008 GDA Retail Strategy which identify a decline in market share. There is no evidence from the Consultants' research that this is the pattern that prevails.
- **Trade Draw:** there was only a 5.7% convenience expenditure inflow from people living outside of the County. In contrast to the pattern with market share, there has been a slight decline of 3.3% from 9.0% to 5.7% in the County's convenience trade draw between 2001 – 2009. This modest decline is not an issue in respect of the County's role and importance in shopping patterns or its competitiveness. Again, there is a contrast with the findings presented in the 2008 GDA Retail Strategy which indicate that convenience trade draw has increased by 4.0% on that assumed in the 2005 Strategy assessment. This has not been found in the Consultants' research.

3.3.2 Comparison Shopping Expenditure Patterns

The 2009 household and shopper surveys revealed the following comparison shopping expenditure patterns:

- i. **Market Share:** some 67.0% of comparison expenditure was retained in the County, with 33.0% of spend leaking elsewhere. This is a 14.0% improvement since the 2001 GDA Retail Strategy surveys were undertaken, when only 53.0% of residents' comparison spend was retained. It is 6.0% above that identified in the 2008 GDA Retail Strategy but this difference is offset by its assumption of greater trade draw. The increase in market share responds to the improvements in the County's quality and quantum of comparison floorspace; and
- ii. **Trade Draw:** there was a 15.0% comparison expenditure inflow from people living outside of the County. This was an improvement of 9.0% from that which prevailed in 2001 and applied in the 2005 Strategy. The 15.0% trade draw is some 12.0% below that derived in the 2008 GDA Retail Strategy which assumes a trade draw of 27.0%, which would represent an increase of 21.0% since 2001 with only Whitewater Shopping Centre and the KVOC being new retail schemes which have the middle and higher order comparison of mass appeal to shoppers outside of the County. This also has to be set in the context of significant improvements in middle and higher order comparison shopping in the Dublin conurbation, Carlow and other higher order competing centres. The adoption of the 2008 GDA Retail Strategy 27.0% trade draw assumption would increase rather than decrease the potential for additional comparison floorspace in the County. While it can be

agreed that there has been a substantial and important improvement in comparison trade draw to the County, for the purposes of the assessment the lower and more conservative 15.0% figure has been adopted.

3.3.3 Projected Turnover of Retail Outlets

The derived market share and trade draw assumptions from the 2009 household and shopper surveys have been incorporated in Table 3.2 which provides the estimation of turnover in retail floorspace in the County over the period to 2022.

To calculate turnover, the amount spent by Kildare residents in retail outlets located outside the area (leakage) is subtracted from the total amount of potential retail expenditure by these residents. To this is added the additional expenditure which is due to people living outside the County. The combination of these deductions and additions provides the derived total turnover of retail outlets located in the County. This is the process used in calculating the turnover figures presented for 2008, 2016 and 2022 in Table 3.2 for both convenience and comparison floorspace under the low and high growth scenarios

Table 3.2 Projected Turnover from Retail Outlets Located in County Kildare (2006 prices, €m)

Year		Convenience			Comparison	
		Low	High		Low	High
2008						
Resident Expenditure		778.5	793.0		863.1	879.2
Less Expenditure Outflow	2.2%	17.1	17.4	33.0%	284.8	290.1
Spend by Residents in Outlets in catchment area		761.3	775.5		578.3	589.1
Add Imported Expenditure	6.0%	48.6	49.5	15.0%	102.1	104.0
Total Spend in Catchment Area		809.9	825.0		684.4	693.0
2016						
Resident Expenditure		1,043.4	1,144.8		1,172.8	1,286.8
Less Expenditure Outflow	2.2%	23.0	25.2	33.0%	387.0	424.6
Spend by Residents in Outlets in catchment area		1,020.5	1,119.6		785.8	862.2
Add Imported Expenditure	6.0%	65.1	71.5	15.0%	138.7	152.1
Total Spend in Catchment Area		1,085.6	1,191.1		924.5	1,014.3
2022						
Resident Expenditure		1,229.3	1,518.6		1,544.1	1,907.5
Less Expenditure Outflow	2.2%	27.0	33.4	33.0%	509.6	629.5
Spend by Residents in Outlets in catchment area		1,202.3	1,485.2		1,034.6	1,278.0
Add Imported Expenditure	6.0%	76.7	94.8	15.0%	182.6	225.5
Total Spend in Catchment Area		1,279.0	1,508.0		1,217.1	1,503.5
Source: DBCL 2010						

3.4 Step 3 – Turnover Ratios

To ensure consistency with the timeframe of the 2008 GDA Retail Strategy, the Base Year for the County Retail Strategy and the capacity assessment is 2008. The turnover figures for 2008 set out in Table 3.2 are an estimate of the amount of expenditure that is sustaining the existing retail floorspace in the County. For example, in 2008 the County had approximately 53,379m² of convenience floorspace that was generating a median turnover (mid-point of the low and high growth scenarios) of €785.8m and some 119,008m² of comparison and bulky goods floorspace that was generating a median turnover of €871.1m. When this floorspace is set against the Gross Expenditure available, this derives an average floorspace turnover ratio of approximately €15,315 and €5,770 per m² for existing convenience and comparison floorspace respectively. These compare to the €12,000 and €5,000 per m² average generally found for existing convenience and comparison floorspace around the GDA. On the basis of these figures, it would be

concluded that there is a surplus of expenditure potential above what is sustaining existing floorspace and this provides a reservoir of additional expenditure potential for new floorspace which requires to be incorporated in the capacity assessment.

This was the position which prevailed when the 2005 Strategy was being prepared and is recognised in the GDA Retail Strategy as overtrading. Given the slowdown in the economy and the difficult trading conditions for many retail businesses and centres, overtrading is not a term generally applied now. The existing convenience floorspace turnover ratio is below the €17,513 per m² identified in the 2005 Strategy but that for comparison comparatively close to the average €5,694 per m² turnover ratio for existing floorspace derived in the 2005 Strategy. The sustained above average turnover levels for existing convenience and comparison floorspace are a result of a number of important factors and influences:

- The substantial growth in per capita expenditure
- The very significant population increase the County has witnessed
- The increased levels of both convenience and comparison expenditure market share, particularly the latter, combined with the considerable increase in comparison spend inflows.

3.5 Step 4 – Gross Additional Expenditure Potential

Using the derived turnover estimates, it is possible to estimate the growth in spare expenditure capacity that will occur in the County up to 2016 and 2022. These estimates are provided in Table 3.3.

Table 3.3 Gross Spare Expenditure Capacity (2006 prices, €m)

Period	Convenience		Comparison	
	Low	High	Low	High
2008 – 2016	275.6	366.1	244.1	321.3
2016 – 2022	193.5	388.9	292.7	489.2
Total 2008 – 2022	469.1	755.0	536.8	810.5
Source: DBCL 2010				

The table illustrates that convenience Gross Spare Expenditure is greater than comparison between 2008 – 2016 but that comparison expenditure potential exceeds convenience post 2016. This is a direct consequence of comparison per capita expenditure not exceeding 2008 levels until 2013 whereas convenience per capita growth is sustained.

3.6 Step 5 – Future Sources of Retail Sales

The spare expenditure figures that have been estimated for the County are gross estimates and need to be adjusted to take account of expenditure that may occur via new retail developments that are due to come on stream, increases in turnover efficiency and any evidence of surplus potential expenditure (the possibility of growth in internet retailing in the per capita figures has already been accounted for). These are each addressed below.

3.6.1 Extant Planning Permissions

The freeze date for extant planning permissions incorporated in the capacity assessment is the end of March 2009. In considering **new retail outlets** that are planned for development, regard is had only to those developments with a net floorspace over 500m² for convenience floorspace and 1,000m² for comparison. These are below the 5,000m² gross floorspace threshold for Level 1 and 2 centres and that of 2,500m² gross for Level 3 and below centres set out in the 2008 GDA Retail Strategy. The application of lower thresholds reflect the rural nature of much of the County and the need to ensure that smaller new

developments, which may be large in the context of smaller centres, are taken due account of.

At the March 2009 freeze date, derived from the application of the above threshold, there was planning consent for an additional **48,340m²** of net retail floorspace comprising in the order of 21.6% of convenience, 39.6% comparison and 38.7% bulky goods floorspace. This captures a significant quantity of available Gross Expenditure Potential and in fact erodes the scope for new schemes coming forward between 2008 – 2016.

Since the freeze date, there has been no progress on the outstanding granted permissions that were not already under construction, which is a direct consequence of the effects of the current economic recession. It is not a trend that is unique to the County but one which prevails across the GDA and wider country. Over the period to 2016, it is unlikely that all of the grants will be developed out and trading and a number are likely to re-emerge but reduced in scale. This was an issue recognised in the 2008 GDA Retail Strategy where the assumption that none of the grants would progress was included in the Regional Retail Strategy's capacity assessment. This could have been the approach adopted in the new County Retail Strategy but it was decided that all of these permissions could come forward and the Retail Strategy seeks to encourage this. However, for the purposes of the capacity assessment, it has been assumed that overall under what would be a worst case scenario then of the order of 30.0% are likely to be fully trading and capturing expenditure potential at 2016 with others establishing this post 2016. This assumption has been incorporated in the broad assessment of the requirement for additional retail floorspace.

3.6.2 Turnover Efficiency

Over time, the efficiency of comparison floorspace is assumed to increase by 1% per annum. Convenience floorspace is assumed to be operating efficiently and there is no further scope for increased efficiency. Comparison turnover efficiency growth is calculated for existing and extant comparison floorspace. The effect of turnover efficiency gains reduces the County's comparison expenditure capacity by €2.66 million per annum between 2008 – 2022.

3.6.3 Surplus Expenditure Potential

As has been highlighted, there is evidence of surplus convenience and comparison expenditure potential in the County. This provides a reservoir of additional potential expenditure that serves to increase the County's capacity to absorb new retail development. It is calculated as the amount of new floorspace required to align the estimated 2008 convenience and comparison turnover ratios with the average that generally prevails in the GDA. To achieve this within the County of the order of between **1,222m²** and **687m²** of additional net convenience and comparison floorspace is required. While the figures are not significant in scale, they nevertheless require to be taken account of and fed into the capacity equation.

3.7 Step 6 – Capacity Potential

3.7.1 Net Expenditure Potential

The expenditure accounted for by the potential new retail development assumptions and turnover efficiency growth is subtracted from the estimates of gross additional expenditure potential in Table 3.3. This results in estimates of net additional expenditure capacity potential, as set out in Table 3.4.

Table 3.4 Net Expenditure Potential (2006 prices, €m)

Period	Convenience		Comparison	
	Low	High	Low	High
2008 – 2016	199.6	290.0	167.3	244.5
2016 – 2022	193.5	388.9	277.3	473.8
Total 2008 – 2022	393.0	678.9	444.6	718.3
Source: DBCL 2010				

As the table indicates, there is expenditure capacity for additional floorspace in the County over the periods 2008 – 2016 and 2016 – 2022.

3.7.2 Floorspace Potential

The final part of the capacity assessment is to determine the amount of floorspace that is required to accommodate any anticipated increase in retail expenditure over the period of the County Retail Strategy and beyond up to 2022. This requires to incorporate both the net expenditure capacity which is available and that which can be attributed to the surplus potential in both convenience and comparison floorspace that has been found to prevail.

By applying derived median weighted turnover ratios for new floorspace to the estimated net spare expenditure capacity presented in Table 3.4 plus making allowance for the surplus potential expenditure, the estimated net retail floorspace potential is able to be calculated. The turnover ratios applied for both convenience and comparison floorspace are median weighted across the different types for both floorspace. They are set at a 2006 Price Year and are consistent with what the figures in the 2008 GDA Retail Strategy would be at that Price Year. For net convenience floorspace, a turnover ratio of €14,280 per m² is used, while a ratio of €6,655 per m² is applied for the comparison. Based on these principles, Table 3.5 sets out the broad assessment for additional retail floorspace in the County to 2016 and 2022.

Table 3.5 Indicative Net Floorspace Potential (m²)

Period	Convenience		Comparison	
	Low	High	Low	High
Surplus	1,222	1,222	687	687
2008 – 2016	13,975	20,307	25,140	36,735
Total 2008 – 2016	15,198	21,529	25,826	37,421
2016 – 2022	13,547	27,233	41,663	75,945
Total 2008 – 2022	28,744	50,154	67,489	111,366
Source: DBCL 2010				

The table indicates that at both 2016 and 2022, in addition to assumptions on granted convenience floorspace, there is substantial scope for the County's convenience offer to be greatly improved by between **15,198m² – 21,529m²** and **13,547m² – 27,233m²** respectively under the low and high growth scenarios, with the total over the period to 2022 being **28,744m² – 50,154m²**.

In respect of the potential for new comparison floorspace, after assumptions on current grants are accounted for, the table illustrates that there is significant potential at both 2016 and 2022 for Kildare's comparison offer to continue to be enhanced by between **25,826m² – 37,421m²** and **41,663m² – 75,945m²** respectively, with the total over the period to 2022 being **67,489m² – 111,366m²**.

The overall assessments are realistic and realisable at each stage of the assessment given:

- i. The Draft RPPGDA population targets and the actual trends that have prevailed in the County over the last 10 – 15 years;
- ii. The key input of the ESRI's economic baseline and projections; and
- iii. The high growth scenario would deliver between 2008 – 2022 of the order of the same level of floorspace as achieved between the shorter timeframe of 2001 – 2009.

The outturn is that the indicative/broad assessment of the potential for additional floorspace, particularly but not exclusively comparison floorspace, enables the objectives for the County's main and emerging centres over the period to 2016 and beyond to be met.

3.8 Comparative Analysis Against 2008 GDA Retail Strategy Assessment

It is recognised that the County Retail Strategy is informed by the 2008 GDA Retail Strategy and should be compliant with it. In terms of the requirement for additional retail floorspace, Tables 5.9 and 5.10 of the Regional Retail Strategy set out the projected convenience and comparison shopping needs of the different local authority areas in the GDA to 2016. Although different approaches to the assessment of the requirement for additional retail floorspace in the County have been adopted in the Regional Retail Strategy and the new County Retail Strategy, the outturn figures are comparable as follows:

- **Convenience:** the 2008 GDA Retail Strategy's gross lettable floorspace convenience need is given as one figure for each of the local authority areas – there is no low or high projection – and is assessed to be **13,224m²**, inclusive of the 20.0% allowance to accommodate future demand in the County. This compares with the low growth scenario convenience net floorspace assessment in the new County Retail Strategy of **15,198m²** which roughly translated could be the difference of an additional superstore when set against the Regional Retail Strategy projection.
- **Comparison:** the 2008 GDA Retail Strategy's assessment of comparison floorspace requirements for each of the GDA local authorities is given for both low and high growth scenarios over the period to 2016. In respect of the County, the Regional Retail Strategy assesses this under low and high growth scenarios to be **70,731m² – 96,453m²** gross at 2016. This is substantially above that assessed over the period in the new County Retail Strategy's assessment which is **25,826m² – 37,421m²**, even when gross to net floorspace ratios are taken into account.

3.9 Conclusion

It would be concluded that the County Retail Strategy capacity assessment is consistent with the quantitative guidance provided in the 2008 GDA Retail Strategy. Additionally, it provides a realistic and realisable assessment of the requirement for additional retail floorspace in Kildare over the period to 2016 and beyond which will enable the retail planning objectives for the County to continue to be realised, particularly in respect of sustaining its attraction and competitiveness not only in shopping terms but, importantly, as allocation for living, working, visiting and investing in.

Finally, it is important to recognise that the figures presented in the capacity assessment provide a broad assessment of the **requirement** for additional new floorspace. They should, therefore, be taken as **indicative** and as **guidance** on the quantum that will be required and are in no way intended to be prescriptive. It is not a function of the capacity assessment to place a definitive cap on the scope for future retail development in the County. As has been highlighted, the assessment is a tool to informing decision making with the real control factor being meeting the tests of the assessment criteria for retail developments. This responds to the fact that a number of centres – existing or proposed, are on the periphery of the County and will have trade draws that differ from those established for the County as a whole in the County Retail Strategy. As such, proposals for each will require to be assessed on their merits under the tests of the County Retail Strategy assessment criteria, as well as those set down in the RPG

and 2008 GDA Retail Strategy rather than the quantity of floorspace being examined as solely a quantitative exercise.

4.0 RETAIL DEVELOPMENT POTENTIAL – THE PRINCIPLES

As with the 2005 Strategy, the previous sections of the report have set out the quantitative foundations for the County Retail Strategy. They highlight the major changes which have occurred in the population and retail floorspace baselines and in shopping patterns in the County since the 2005 Strategy was prepared. Prior to examining the effectiveness of the 2005 Strategy and establishing the detail of the new County Retail Strategy, it is important to review and address the current influencing factors that are shaping shopping at the settlement level. This is necessary in order to:

- i. Determine the potential of the main centres in the County to accommodate additional retail floorspace over the time period of the emerging County Development Plan and the County Retail Strategy and in the years to 2016 and beyond to 2022, the end date of the new NSS and RPGGDA; and
- ii. Inform the review of the County Retail Hierarchy.

The factors considered are:

- Health checks – issues and opportunities
- Designation in the 2005 Strategy and 2008 GDA Retail Strategy retail hierarchies
- Core Retail Areas
- The Sequential Approach
- Current retail trends and issues.

The framework for the assessments is structured by defined Sub County Areas in the following sequence:

- i. North East Area (Section 5);
- ii. Central Area (Section 6); and
- iii. South Area (Section 7).

The key findings of the health checks and assessments of retail potential are summarised in the following sections. Consistent with the framework adopted in the 2005 Strategy, prior to setting out the summary assessments, it is important to set out the key principles that have underpinned the approach adopted.

4.1 Health Checks – Issues & Opportunities

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

- Health checks of the main centres in the County which included site and Core Retail Area appraisals undertaken by the Consultants
- Knowledge of key planning applications, both granted and refused
- Consultations and workshops held between the Council and the Consultants
- Submissions received in response to invitations for submissions to the Strategy and the Draft County and Naas Development Plans.

There were nineteen main centres where health checks were undertaken in the preparation of the 2005 Strategy. Reflecting settlements where there was now a LAP or where one or a Village Plan was proposed,

the number of centres in the health checks was increased to twenty four which included the grouping of Ballitore, Crookstown, Moone and Timolin. Although it was recognised that not all of the centres would be the location for major additional new floorspace, to differing degrees they were acknowledged as the centres where retail floorspace would be distributed over the timescale of the County Retail Strategy, taking due account of prevailing Regional and County settlement and retail hierarchies. In addition to the health checks, each of the centres was reviewed in respect of:

- i. Current and emerging Development Plan, LAP, AAP and Masterplan policies, objectives and land use zonings;
- ii. Adopted and Draft IFPLUTS for the key towns and areas of the County;
- iii. The changes in population trends between 1996 – 2006; and
- iv. Review of retail market performance, informed by the 2008 GDA Retail Strategy and the Consultants' work in the sector nationally and internationally.

These surveys, reviews and workshops with the Council provided the foundation for an updated assessment of retail potential at a settlement level.

4.2 Retail Hierarchy

An important influence on the role and potential of the different centres is their designation in the 2005 Strategy and 2008 GDA Retail Strategy retail hierarchies. These are provided for reference in Tables 4.1 and 4.2 respectively, with the latter also providing the regional context the new County Retail Strategy is set within.

Table 4.1: 2005 County Kildare Retail Hierarchy

Level	Metropolitan Area	Hinterland Area
Level 2	Major Town Centres	Twin County Town Centres
	Collinstown	Naas and Newbridge
Level 3	Town Centres	Sub County Town Centres/Town Centres
		Tier 1 Level 3 Sub County Town Centre Athy and Kildare Town
	Celbridge, Kilcock, Leixlip and Maynooth	Tier 2 Level 3 Town Centre Clane, Kilcullen and Monasterevin
Level 4	Village Centres	Local Centres – Small Towns & Village Centres
		Tier 1 Small Town Centres Castledermot, Prosperous, Rathangan and Sallins
	Straffan	Tier 2 Village Centres Ballymore-Eustace, Johnstown and Kill
Level 5	Corner Shops	Smaller Village Centres/Crossroads/Rural Settlements

Source: 2005 Kildare County Development Plan

Table 4.2 2008 Retail Hierarchy for the GDA

Level 1	METROPOLITAN CENTRE
	Dublin City Centre
Level 2	MAJOR TOWN CENTRES & COUNTY TOWN CENTRES
	Fingal: Swords, Blanchardstown
	South Dublin: Tallaght, Liffey Valley
	Dun Laoghaire: Dun Laoghaire, Dundrum
	Wicklow: Bray, Wicklow
	Meath: Navan
	Kildare: Naas/Newbridge, Leixlip (including Collinstown*)
Level 3	TOWN AND/OR DISTRICT CENTRES & SUB COUNTY TOWN CENTRES (Not definitive list, see text below)
	Dublin City: Finglas, Northside Shopping Centre, Ballyfermot, Rathmines, Crumlin Shopping Centre, Donaghmede Shopping Centre, Omni, Ballymun, Point Village, Poolbeg
	Fingal: Malahide, Balbriggan, Skerries, Charlestown
	South Dublin: Adamstown, Crumlin (Ashleaf), Clonburris/Balgaddy, Clondalkin, Fortunestown, Kilnamanagh, Lucan, Rathfarnham
	Dun Laoghaire-Rathdown: Stillorgan, Blackrock, Cornelscourt, Nutgrove, Cherrywood
	Wicklow: Greystones, Arklow, Blessington, Baltinglass
	Meath: Dunboyne**, Ashbourne, Dunshaughlin, Kells, Trim, Laytown/Bettystown, Enfield
	Kildare: Celbridge, Kilcock, Maynooth, Kilcullen, Athy, Kildare, Monasterevin, Clane
Level 4	NEIGHBOURHOOD CENTRES, LOCAL CENTRES-SMALL TOWN CENTRES & VILLAGES
Level 5	CORNER SHOPS/SMALL VILLAGES
Source: 2008 Retail Strategy for the Greater Dublin Area	
Note: * Leixlip (including Collinstown) is designated to grow into a Level 2 Major Town Centre over the next 20 years	
** Dunboyne will gradually develop over the next 20 years towards Level 2 status	

4.3 Core Retail Areas

All of the identified centres were examined on the ground in respect of defining their Core Retail Areas, as was the approach adopted in the 2005 Strategy. What requires to be re-emphasised is that the definition of Core Retail Areas is very different from the broad town centre zonings covering the different centres, the approach which has generally characterised retail policies in older Development Plans and LAPs to date. It is, therefore, important to reinforce the clarification of what Core Retail Areas are and why they have emerged as an instrument of policy and requirement of the RPG. These are addressed under the following headings:

- What characteristics define Core Retail Areas?
- Why is it important to define them?

- How is this applied at the County settlement level?

4.3.1 Characteristics that Define Core Retail Areas

The Core Retail Area is that part of a town centre which is primarily devoted to shopping. It 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 the highest in demand from retailers/operators/developers and investors and where pedestrian flows are greatest. Outside of this area, there may be important retail areas or freestanding shopping centres. In respect of the former, retail floorspace would only be one of the town centre uses. The mix of uses, in addition to civic and cultural buildings, normally would be commercial leisure, services related or residential and such areas are termed the secondary and tertiary retail areas of larger centres. These would be the preferred locations for retail expansion and renewal. As was the case in the 2005 Strategy, it is important to highlight that the majority of smaller centres do not have what would be defined as a Core Retail Area as the centres are generally fragmented in respect of the location of retail floorspace and the retail market more locally driven. However, in the interim period, in view of new retail development a number of centres in the County have witnessed an expansion of what would be defined as their Core Retail Areas. These areas are identified for each centre as *Proposed Extensions* in the figures which define the Core Retail Areas in the sections that follow.

4.3.2 Importance of Defining Core Retail Areas

The RPG set down the Sequential Approach to the determination of retail applications. This was adopted in the 2005 Strategy and is inherent in the 2008 GDA Retail Strategy. It has underpinned the determination of retail applications in the County over at least the last eight years. The Sequential Approach essentially recognises the importance of sustaining the retail importance, vitality and viability of town centres. The emphasis in the RPG, 2005 Strategy and 2008 GDA Retail Strategy is on town centres, district centres and large village centres and their redevelopment and expansion. Proposals for retail schemes, and not just major developments, are required to take cognisance of this. Therefore, in order to be able to undertake the Sequential Approach, as required in the RPG, then the **starting point** is the definition of the Core Retail Area of main centres.

The appropriateness of defining a Core Retail Area, which is in essence the heart of a town centre rather than the broader town centre zoned lands, is important for the following reasons:

- i. The larger the defined Core Retail Area or Prime Shopping Area then the greater the scope to diffuse retail floorspace around a wider area;
- ii. This could bring policy conflicts and a potential wider distribution of floorspace; and
- iii. The result could be a real threat of weakening not strengthening the Core Retail Area/heart of the town centre.

There are numerous examples around the country of where the principle of Core Retail Areas has not been applied and this has had a detrimental effect on the vitality and viability of the centre. It has not been the approach adopted by the Council and has been a fundamental strand of retail planning policy which will remain intact and important in the County Retail Strategy.

4.3.3 Application at Settlement Level

In the County Retail Strategy, the focus is on **main centres** as this is where large scale development will be located, through the control applied by respecting the retail hierarchy. Additionally, from the review and update of the health checks and the new centres included in the assessment, it remains 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 at the highest levels in the County and GDA retail hierarchies,

namely Level 2 and 3 centres.

The assessment in fact did not define any new Core Retail Areas and only determined that those in Naas, Newbridge, Maynooth, Athy, Clane and Kildare Town should be expanded. The Core Retail Areas defined in the new County Retail Strategy should be incorporated in the preparation of Development Plans and LAPs and adopted, where appropriate, as variations to recent Plans. The Plans should also apply the principles set out in the Strategy.

It is recognised that over the timescale of the County Retail Strategy and beyond there will require to be an expansion of many of the County's main centres. To ensure that guidance is provided to the market as to what are the appropriate areas for expansion these areas are identified for the different centres in the Strategy. As such areas are delivered and consolidate and expand the town centres then the Core Retail Areas will subsequently extend, as has been the case since the 2005 Strategy was prepared in respect of the County's main centres. Reflecting this, the designations of the different Core Retail Areas require to be monitored and up dated, if appropriate, over the period of the Strategy to ensure that the guidance remains valid and clear.

4.4 Sequential Approach

The Sequential Approach in summary defines that:

- The preferred location for new retail development, where practicable and viable, is within a town centre (or city, district or major 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 Core Retail Area, and less in smaller settlements. The distance considered to be convenient will, however, vary according to local circumstances and this is given weight by An Bord Pleanála (the Board) in its planning decisions.
- Only 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.

While the focus is on town centres, the RPG recognise that not all retail formats can be accommodated or are appropriate in the heart of a town centre. Such formats include large foodstores, particularly in constrained historic town centres, and retail parks/retail warehouses which are recognised in general not to fit easily into town centres given their size requirements and the need for good car parking facilities and ease of servicing. As has been experienced around the County and country, there will be pressure for edge of centre and out of centre large space retail floorspace. This will be resisted by the Council in the interests of sustaining and enhancing the short, medium and long term vitality and viability of town, district and large village centres and the controls for achieving this are set down under the Sequential Approach and the Retail Strategy's assessment criteria for retail applications.

As part of the preparation of the new County Retail Strategy, the retail development potential of each centre against the criteria of **land availability** and **potential** was reviewed by the Consultants and set against the tests of the Sequential Approach.

4.5 Retail Planning Policy Framework

The new County Retail Strategy will: provide the foundations for the Retail Chapters of the emerging

County and Naas Town Development Plans; inform the later review of the Athy Town Development Plan; and, shape the retail policies and zonings of emerging and programmed LAPs and AAPs. There are a number of LAPs which are programmed for review and the review of these LAPs will follow the publication of the Draft County Development Plan in April 2010. This noted, as part of the examination of retail potential, it is important to understand the zoning policies and objectives of adopted plans and those at an advanced stage in the development plan process. These are summarised in Table 4.3. The table is ordered by the County Retail Hierarchy.

Table 4.3 Zoning Policies & Objectives in Existing & Draft Development Plans Relating to Retail

Plan	Zoning Objective
County Kildare	
2005 – 2011 Kildare County Development Plan (A review of this Plan is currently underway)	<p>A – Town Centre/Core Retail – To protect and enhance the special physical and social character of the existing town centre and to provide for new and improved town centre facilities and uses.</p> <p>G – Village Urban Centres – To provide for retailing, community and social facilities</p> <p>N – Neighbourhood Centre – To provide for a new neighbourhood centre and associated facilities.</p>
Level 2 Major Town Centres & County Town Centres	
2010 Leixlip Local Area Plan	<p>TC 1 To facilitate the development of the following in order to improve the vitality and vibrancy of the Town Centre:</p> <ul style="list-style-type: none"> (i) To provide a new street to link Captains Hill and Mill Lane; (ii) To facilitate pedestrian links between St. Mary's/Riverdale and the new street and from the new street onto Main Street; (iii) To consider development proposals adjoining the new street that will improve traffic movement and parking arrangements in the town; (iv) To consider appropriate development along the escarpment between Riverdale and the new street; (v) To facilitate development that will act as a dynamic centre to attract and retain business in the town centre and reduce the negative visual impact of the ESB mast.
2010 Collinstown Local Area Plan	<p>MTC1 – To facilitate the development of up to a large-scale retail core within the Collinstown Town Centre over a 20 year period.</p> <p>A – Major Town Centre – To provide for major town centre facilities comprising an appropriate mix of employment, retail, recreational, civic, cultural and residential uses within a high quality urban environment linked to the local community, town and Leixlip, and wider County and Region.</p>
2005 – 2011 Naas Town Development Plan (A review of this Plan is currently underway)	<p>A – Town Centre – To protect and enhance the special physical and social character of the existing town centre and to provide for new and improved town centre facilities and uses.</p> <p>G – Urban Village Centre – To provide for retailing, community and</p>

	<p>social facilities for the local population of the Northwest Quadrant of Naas and to support and compliment the attractiveness of Millennium Park for major Foreign Direct Investment and international, national and local investment.</p> <p>K – Residential/Commercial – To preserve the existing and provide for new residential and commercial uses.</p> <p>N – Neighbourhood Centre – To provide for a new/existing Neighbourhood Centre and associated facilities.</p> <p>R – Commercial/Retail – To provide for and improve retailing and commercial activities.</p>
2003 Newbridge Local Area Plan	<p>P2.2.3a – It is the policy of the Council to promote Droichead Nua as a retail centre of regional importance and to encourage the further development and upgrading of modern shopping facilities.</p> <p>A – Town Centre – To provide for the development and improvement of appropriate town centre uses including retail, commercial, office and civic use.</p> <p>G1 – Neighbourhood Centre (north of railway) – To provide for new neighbourhood facilities.</p> <p>G2 – Neighbourhood Centre (east bank of Liffey) – To provide for new neighbourhood facilities.</p>
Level 3 Centres	
	Level 3 Metropolitan Area Town Centre
2010 Celbridge Local Area Plan	<p>TC2 – To favourably consider development proposals to upgrade and expand the existing retail outlets in the town centre especially where such outlets are underused or vacant.</p> <p>Donaghcumper Town Centre Expansion Area – The Council seeks to ensure that Celbridge Town Centre (comprising the existing Main Street/Mill Street and the Donaghcumper Town Centre Expansion Area) becomes a vibrant, pleasant, comfortable and safe place for all who utilise the area. This area shall provide a broad mix of uses to allow for the social, economic and cultural regeneration of the area.</p>
2007 Celbridge Donaghcumper Action Area Plan	<p>That Celbridge Town Centre – comprising the existing Main Street/Main Street are and Town Centre Extension Area – is a vibrant, pleasant, comfortable and safe place for all those who live in, work in and visit the area.</p> <p>Retail and Commercial – Town Centre Extension Area.</p>
2009 Kilcock Local Area Plan	<p>TC 1 – To favourably consider development proposals to upgrade and expand the existing retail outlets in the town centre especially where such outlets are underused or vacant.</p> <p>R1 – Retail/Commercial – To provide for commercial development.</p> <p>A – Town Centre – To provide for the development and improvement of appropriate town centre uses including retail, commercial, office and civic use.</p>
2002 Maynooth Development Plan	<p>It is the policy of the Council to seek to strengthen the role of the town centre, to increase its vibrancy and to improve its environment. Consequently, the Council will encourage the development and re-development of residential, commercial, cultural and social activity in the</p>

	<p>area.</p> <p>A1 Town Centre – To provide for the development and improvement of appropriate town centre uses including retail, commercial, office and civic use.</p> <p>A2 Town Centre Extension – To promote mixed use development as an extension of the town centre.</p>
2006 Maynooth Harbour Action Area Plan	Objective 1 – To facilitate the expansion of the town centre in a co-ordinated and comprehensive manner.
	Tier 1 Level 3 Hinterland Area Sub County Town Centre
2006 Athy Town Development Plan	<p>Goal – To promote and encourage major enhancement and expansion of the retail floorspace and town centre functions of Athy, to further develop its competitiveness with nearby towns such as Carlow and Portlaoise and its importance as a Sub County Town Centre in the County and wider Greater Dublin Area and to promote social inclusion.</p> <p>A – Town Centre – To protect and enhance the special physical and social character of the existing town centre and to provide for new and improved town centre facilities and uses.</p> <p>R – Commercial & Retail – To make provision for an improved retail service in Athy.</p>
2002 Kildare Town Local Area Plan	<p>P2.7.1 – It is the policy of the Council to re-establish the historic town centre as the heart of the town, to increase its vibrancy and to improve its environment.</p> <p>P2.7.2 – It is the policy of the Council to promote the town centre as a residential, retail, commercial and service location.</p> <p>A – Town Centre – To provide for the development and improvement of appropriate town centre uses including retail, commercial, office and civic use.</p>
2005 Magee Barracks Local Area Plan	Key Objective 1 – Creation of a vibrant urban quarter, linking to the town centre, that complements and enhances the development of Kildare Town.
2004 Southgreen Action Area Plan	<p>A1 – Commercial Development – This site is zoned to provide clusters of commercial development at local centres. Permitted uses on this site will include office-based activities and retail units.</p> <p>F3 – Low Density Residential Development – This site can accommodate low density housing at an indicative density of 20 units per hectare. Permitted Uses on this site include a cluster of neighbourhood retail outlets at F3 which should have a strong presence onto the Internal Link Road thereby enhancing the transition of the character of this road to that of a street.</p>
2009 Clane Local Area Plan	<p>TC 2 – To favourably consider development proposals to upgrade and expand the existing retail outlets in the town centre especially where such outlets are underused or vacant.</p> <p>A – Town Centre – To provide for the development and improvement of appropriate town centre uses including retail, commercial, office and civic use.</p>

	Tier 2 Level 3 Hinterland Area Town Centre
2008 Kilcullen Local Area Plan	<p>OR 1 – To zone appropriate areas of land in the town centre for the development of additional retail and commercial units in the area.</p> <p>OR 6 – To respond positively to applications for appropriately scaled retail and other town centre developments within Kilcullen, where they respect and enhance the existing built fabric.</p> <p>A – Town Centre – To provide for the development and improvement of appropriate town centre uses including retail, commercial, office and civic use.</p> <p>N – Neighbourhood Centre – To provide for a new neighbourhood centre and associated facilities.</p>
2008 Monasterevin Local Area Plan	<p>TC 1 – To facilitate the extension of the existing town centre to the south of Dublin Street and within the Moore Abbey Demesne in order to improve the vitality and vibrancy of the town centre. This shall be named the new ‘Urban Quarter’ and shall include the following: (The details of what shall be included are set out in Appendix C).</p> <p>TC 3 – To favourably consider development proposals to upgrade and expand the existing retail outlets in the town centre especially where such outlets are underused or vacant.</p> <p>A – Town Centre – To provide for the development and improvement of appropriate town centre uses including retail, commercial, office, health, educational and civic use.</p> <p>A2 – Town Centre Extension into the Moore Abbey Demesne</p>
2009 Sallins Local Area Plan	<p>TC 1 – To favourably consider development proposals to upgrade and expand the existing retail outlets in the town centre especially where such outlets are underused or vacant.</p> <p>A – Town Centre – To provide for the development and improvement of appropriate town centre uses including retail, commercial, office and civic use.</p>
Level 4 Small Towns & Village Centres	
	Level 4 Metropolitan Area Village Centre
2002 Straffan Local Area Plan	<p>To promote local retail service provision within the village core.</p> <p>A – Village Core – To provide for the development and improvement of appropriate village centre uses.</p>
	Tier 1 Level 4 Hinterland Area Small Town Centre
2009 Castledermot Local Area Plan	<p>TC 2 – To encourage development proposals to upgrade and expand the existing retail outlets in the town centre especially where such outlets are underused or vacant.</p> <p>A – Town Centre – To provide for the development and improvement of appropriate town centre uses including retail, commercial, office and civic use.</p>
2007 Prosperous Local Area Plan	<p>3. – Promote the town centre as a mixed retail, commercial and service location serving local needs and those of the surrounding hinterland.</p> <p>5. – The Council will respond positively to applications for retail and other town centre developments where they respect and enhance the existing built fabric and where it can be demonstrated that road and</p>

	<p>pedestrian safety shall not be compromised.</p> <p>A – Town Centre – To provide for the development and improvement of appropriate town centre uses including residential, retail, commercial, office and civic use.</p> <p>B – Mixed Use – To provide for mixed use development as a consolidation of the town centre.</p>
2002 Rathangan Local Area Plan	<p>P2.7.1 – It is the policy of the Council to re-establish the historic town centre as the heart of the town, to increase its vibrancy and to improve its environment.</p> <p>P2.7.2a – It is the policy of the Council to promote the town centre as a residential, retail, commercial and service location.</p> <p>A – Town Centre – To provide for the development and improvement of appropriate town centre uses including retail, commercial, office and civic use.</p> <p>Development Area A – To encourage small retail units on the approach to this area from Memorial Park in the interests of promoting greater usability of this space. Uses at this location may include market stalls, a farmers market, display of arts and crafts etc.</p>
2007 Rathangan Action Area Plan	<p>To facilitate the expansion of the town centre in a coordinated and comprehensive manner, providing greater connectivity between the Town Centre and the AAP lands.</p> <p>To provide an appropriate mix of uses.</p>
	Tier 2 Level 4 Hinterland Area Village Centre
2008 Allenwood Local Area Plan	<p>RET1 – To zone appropriate areas of land in the Village Centre for the development of additional retail and commercial units in the area.</p> <p>RET3 – To favour the provision of retail facilities within the Village Centre.</p> <p>A – Village Centre – To protect and enhance the viability, function and character of the existing village core and to accommodate appropriate new uses.</p>
2007 Athgarvan Local Area Plan	<p>OR 1 – To zone appropriate areas of land in the Village Centre for the development of additional retail and commercial units in Athgarvan.</p> <p>OR 4 – To favour the provision of local retail facilities within the Village Centre, as identified on Map 1.</p> <p>A – Village Centre – To protect and enhance the viability, function and character of the existing village core and to accommodate an appropriate mix of uses.</p>
2002 Ballitore / Crookstown /Moone /Timolin Local Area Plan	<p>Proposals:</p> <p>The general approach should be to intensify development activities within the existing settlements and prohibit any further ribbon development along rural roads.</p>
2008 Derrinturn Local Area Plan	<p>A – Village Centre – To provide for the development and improvement of appropriate village centre uses including retail, commercial, office and community use.</p>

	<p>A1 – Village Centre Extension – To extend Derrinturn village centre and to provide for and improve residential, commercial, office, cultural and other uses appropriate to the centre of this development village.</p> <p>A2 – Village Centre – To provide for the development and improvement of appropriate village centre uses including retail, commercial, office and community use.</p>
1995 Johnstown Local Area Plan	<p>Plan Aim – The emphasis in this plan is on retaining the character of the village and encouraging development while at the same time restricting ribbon development and maintaining a clear division between the village and the countryside.</p>
2002 Kill Development Plan	<p>It is the policy of the Council to reinforce the village centre as the heart of Kill and improve its environment.</p> <p>IC 4 – Encourage the upgrading and expansion of existing retail outlets in the town centre.</p> <p>A – Village Centre – To provide for the development and improvement of appropriate village centre uses including retail, commercial, office and civic use.</p>
1995 Killeel Local Area Plan	<p>The creation of a village centre around the existing church and public house would be of benefit to the village.</p>
Source: Kildare County Council and DBCL 2010	

4.6 Key Retail Trends & Issues

In ensuring the framework is in place for the proper retail planning and development of the County's centres, it is also important that this is informed by the realism of current and emerging/anticipated retail trends and the issues that prevail. This is particularly important given the downturn in the economy which has had a considerable impact on the delivery of granted retail floorspace and the emergence of new proposals. It is a position which significantly contrasts to what prevailed at the time the 2005 Strategy was prepared but one that was recognised as emerging in the retail market overview provided in the 2008 GDA Retail Strategy. While the County Retail Strategy is not prescriptive with regard to what is appropriate or realistically attainable with respect to the different retail formats in the County context, as part of determining the potential of Kildare's main centres it is important to understand the trends, issues and opportunities that prevail. These are examined under the following headings:

- i. Convenience floorspace;
- ii. Comparison floorspace; and
- iii. A broader perspective – retail development principles.

Further explanation of the different retail planning terms outlined in the remainder of this section are set out in the **Glossary of Terms** in Appendix A of this Strategy.

4.6.1 Convenience Floorspace

As with comparison floorspace, convenience comes in an ever increasing range of formats as the sector has modernised significantly in Ireland over the last ten to fifteen years. The key trends and issues in respect of each are summarised below:

- **Convenience Mainstream:** these are generally where the majority of main food shopping is undertaken and are large format superstores operated by national and international retailers – Dunnes, Superquinn and Tesco. Although the County has witnessed an improvement in its

mainstream offer, and there has been considerable market interest, progress has not been as great as the potential identified. There is scope for considerable improvement in the County's main centres. Currently, there is limited new investment in this sector of the convenience market and there has been a downsizing/retraction of commitment from operators. This position is anticipated to be redressed with the recovery of the economy and within the timescale of the County Retail Strategy.

- **Convenience Discounters:** the two German discounters – Aldi and Lidl – have been increasing their share of the market over the last five to ten years and are generally well represented across the County. The current economic climate has increased their market penetration across all sectors of the community and has been a catalyst for a greater range of discount lines being introduced in the mainstream convenience stores and more recently the emergence of Irish discounters. This sector is still active but at a reduced pace. They are prepared to go into main centres but largely in the cities, with there still being a continued preference for out of centre and cheaper locations. Discount foodstores are recognised in the RPG and 2008 GDA Retail Strategy as suitable anchors for neighbourhood and local centres but this equally applies to symbol group stores or express format mainstream convenience shops. There remains potential for increased representation of this sector in a number of the main centres of Kildare.
- **Convenience Symbol Group Stores:** these are generally found around both large and smaller centres in the County providing smaller superstore mainstream food shopping through to corner shops. They come under the symbol group brands which include Centra, Londis, Spar and SuperValu. There is still evidence of investment in this sector, albeit at a lower level. They are recognised as suitable anchors for neighbourhood and local centres but unless they have sufficient scale/critical mass then they often do not have the strength to anchor larger centres.
- **Convenience Independent Family Stores:** these continue to decline in numbers due to the combination of competition and lack of succession strategies. Around the County and country, a large majority have joined symbol group franchises and this trend is set to continue in view of the benefits of economy enabled by mass purchasing. Whether independent or part of a franchise, these stores are an important part of local communities and will continue to be encouraged.
- **Convenience Speciality Stores:** these largely, but not exclusively, are a feature of cities. With the exception of Marks and Spencer *Simply Food*, they are generally independents often linked to the Farm Market circuit. In the current economic climate, the stores are generally focussing on sustaining the vitality and viability of their existing businesses. There is generally limited representation of this sector in the County and there is scope for this to be enhanced, with such potential for this to be achieved in conjunction with tourism development/attractions. In respect of the Marks and Spencer *Simply Food* format in the County, the sole store is that in Naas with the full offer only located in Whitewater Shopping Centre in Newbridge. While the company has retracted in its strategy for this format in the UK, it is still investing across the country and there is potential for similar stores to locate in a selected number of the main centres to locate in the County.
- **Convenience – Small Towns & Villages:** in these smaller centres, the petrol filling station now often combines the dual function of both the petrol station and the main and only store, and in a number of places provides other services such as vehicle repair/servicing, café, hot food outlet and Post Office. In general, they are a decreasing feature of small centres in view of competition and viability issues. A few remain independently operated with the larger ones franchised by the petrol companies to the symbol groups. The RPG seek that new stores are assessed under the tests of the Sequential Approach and indicate a shop up to 100m² net may be allowed when associated with a petrol filling station, subject to meeting the assessment criteria requirements that would be applied to any application for retail development in the same location. It is important to highlight the guidelines do not **prevent** stores larger than 100m² net. The case for the shop requires to be

presented and it must be demonstrated that it is secondary to the primary use as a petrol filling station. Petrol filling station shops provide an essential local retail service and may be the only viable option for shopping and other services in the County's smaller centres – this is an issue which requires due consideration in their assessment.

4.6.2 Comparison Floorspace

Over the last ten years, comparison goods per capita expenditure around Ireland has overtaken that of convenience spend per capita. It reflects a maturing retail economy and greater convergence with trends across the rest of Europe. Although this trend has modified in pace, as a result of the slowdown in the economy, it is still set to continue but recovery will not begin to really kick in until late/post 2010.

The quality and quantum of a centre's comparison offer determines its role and importance in national, regional and local retail hierarchies and this is very evident around the County's main centres. Noting this, the key trends and issues in respect of comparison floorspace potential are highlighted in the paragraphs that follow.

4.6.2.1 Comparison – Middle & Higher Order Floorspace

Comparison Middle and Higher Order floorspace generally relates to national and international fashion/footwear and furniture designer and high street brands. The representation of this sector of the retail market has witnessed a significant enhancement, particularly over the last decade nationally, regionally and locally. In respect of the County, this is reflected in the substantial decrease in comparison expenditure outflows and the parallel increase in spend inflows that have emerged since the 2001 GDA Retail Strategy household and shopper surveys were undertaken, the results of which were incorporated in the 2005 Strategy, and confirmed in the 2008 GDA Retail Strategy and 2009 County Retail Strategy consumer surveys. However, the changes are based on overall limited improvement in the County's middle and higher order shopping offer with the key additions being the Debenhams and Marks and Spencer anchored Whitewater Shopping Centre and the Kildare Town KVOC. The objectives for Naas and the delivery of a Metropolitan Area Level 2 Major Town Centre to serve North East Kildare have not to date been delivered within this sector of the comparison retail market.

Although the 2008 GDA Retail Strategy highlights the number of grants or commitments for this nature of floorspace, it is a sector that is feeling the effects of the recession. This was a trend anticipated in the Regional Retail Strategy. The impacts are evidenced by the frequent recurrence of sales/clearances and the fact that while the high street brands are giving their verbal commitment to new schemes, this is only where there are strong anchors and in recognition that it will be medium to long term. It is this medium to longer term position that the County Retail Strategy requires to provide the framework for, specifically – but not exclusively – in respect of the County's Level 2 Hinterland and Metropolitan Area centres, which are Naas, Newbridge and Leixlip (including Collinstown).

4.6.2.2 Speciality Comparison Floorspace

Speciality comparison shopping is part of the higher order comparison retail sector and would include independent boutiques and footwear shops in Naas, the KVOC and quality homeware/furnishings around the County. The KVOC appears to be sustaining its attraction and performance but requires to enhance its critical mass, based on what is recognised as the floorspace threshold required from experience from other Factory Outlet Centres (FOC) around Europe, if it is to uphold its mass appeal. This is particularly important given the competition from the two centres in Northern Ireland and the more favourable exchange and VAT rates which prevail in that jurisdiction. However, the independent boutique/footwear and homeware/furnishing shops are being very much affected by the slowdown in the economy, with closures being very much evident. The resurgence of this niche shopping sector will be very dependent on economic recovery and centres having more mainstream middle and higher order comparison anchors.

4.6.2.3 Comparison Lower Order Floorspace

Comparison lower order floorspace has increasingly become part of the retail profile of main centres. While it is responding to retail needs and the economic slowdown, the quality of the brand shop frontages which have been permitted has not been positive in respect of the ambience and quality of the streetscape. This is an issue that is not specific to the County and more design based development management in the consideration of planning applications would substantially serve to redress the issue. Although the sector is meeting needs, not all businesses are sustaining viability and the effects are evident on the main streets of the County's main centres.

4.6.2.4 Comparison Bulky Goods Floorspace

As the number of new homes increased, the bulky goods furniture and white goods market significantly grew over the last ten to fifteen years. What was not recognised was that it generally is a market that operates on a regional basis and for retail parks to work then they need a national or international DIY anchor. The combination of these factors has been:

- i. A saturation of the market and pressure for units to be occupied by large space user mainstream comparison operators or discount food retailers;
- ii. The development not to proceed; or
- iii. The scheme to be built and remain vacant.

The County has fared better than many other areas with Naas emerging as the premier location in Kildare for bulky goods shopping. In North East Kildare or the south of the County, needs have generally been met outside of the County in the Dublin conurbation (Blanchardstown and Liffey Valley) or Carlow respectively. Given the market saturation and slowdown in the housing market, it is unlikely that this position will change at least in the medium term.

The application of RPG guidance on the approach to retail parks has not been consistent across the country with a number of other Local Planning Authorities permitting both mainstream comparison and food retailing – large format main shopping superstores and discount foodstores. In the interests of protecting the vitality and viability of existing town centres, the Council has consistently resisted non bulky goods floorspace on retail parks and this position will be reinforced in the policies and objectives of the County Retail Strategy.

4.6.3 A Broader Perspective – Retail Development Principles

As the 2008 GDA Retail Strategy indicated, the retail sector – from having grown to one of the strongest in the economy – is now under considerable stress, given that its emergence was a key feature of the *Celtic Tiger* era. It is recognised by authoritative public and private sector economic and retail market commentators that the dynamics and growth will return, albeit perhaps not at the levels of the last ten to fifteen years. While parity has not yet been achieved with other European retail markets – growth and potential has to be set in the national, regional and local contexts and the lessons that have been learnt. In terms of retail potential, this was highlighted in the 2008 Regional Retail Strategy which identified concerns and issues with respect to the retail planning commitments in the pipeline. This guidance and experience requires to be given due weight in the strategic retail planning of the County.

Looking forward, based on experience, there requires to be an acknowledgement of the underlying issues and an understanding of the retail market in planning for recovery in the new County Retail Strategy and that this is incorporated in the preparation of all new Development Plans/LAPs/AAPs/Masterplans. The marriage of planning, economics and the market in the Strategy and emerging planning frameworks has increasingly been recognised as the appropriate and sound basis on which to balance vision with pragmatism – a vision without the latter does not provide for the proper planning and sustainable

development of an area whether that be at the strategic or local level. In this respect, there are key lessons that require to be given due weight. These are:

- There are a great number of built out or permitted schemes around the country that have not delivered because they have not secured anchors and anchors of sufficient strength. This is an issue that prevails even in a fine weather or buoyant economy. Ensuring this is not the case in new retail schemes in the County's existing and emerging main centres must be a high priority.
- There are also a large number of desirable mixed use schemes with retail/commercial at ground floor level that do not work and at the very worst have high levels of vacancies. The key determinant in the equation is again ensuring that there is a strong anchor or anchors, with the Marks and Spencer *Simply Food* and Boots anchored Naas Town Centre being an exemplar of what is required to make such schemes work.
- Unless there is a strong anchor or anchors then the space will remain vacant. Architects, planners and agents/property advisors need to fully recognise this key principle/economic market dynamic.
- Town centres need to learn from the planning of successful new shopping centres. Expansion is either planned from the heart of the town centre out, which is often very difficult in view of existing uses/interests and Protected Structures, or there are anchors at either end of the centre with linkage punctuated by anchors or attractors which encourage footfall.
- The realism of the timescale for the delivery of any proposal requires to be given due consideration. On average from the time of application, the achievement of full or normal trading conditions can span at least four to five years.
- During more buoyant economic times greater emphasis was achievable in respect of retail and town centre developments. Even then it was a challenge. The pressure is on for quality of design to be given less weight against economic factors – new investment and construction and permanent long term jobs. The latter has been evidenced, rightly or wrongly, to carry little weight with the Board in its planning decisions – accepting that the majority of retail applications end up with the Board for its determination. Economic benefits must be wholly recognised/a balance must be reached but their primacy should be resisted at the cost of poor design and longer term planning objectives.

5.0 RETAIL DEVELOPMENT POTENTIAL – NORTH EAST AREA

The towns and main centres in the County's North East Sub-County Area are:

- i. Celbridge;
- ii. Kilcock;
- iii. Leixlip;
- iv. Maynooth; and
- v. Straffan.

5.1 Celbridge

5.1.1 Health Check

Celbridge, with Kilcock, Leixlip and Maynooth, forms part of the Metropolitan Area Primary Dynamic Cluster in the RPPGDA 2004 – 2016 and the County Development Plan 2005 – 2011 settlement strategies. All of these centres are designated as Moderate Growth Towns in the County Development Plan settlement hierarchy and are close to the M4 Motorway. Celbridge is designated as a Level 3 Metropolitan Area Town Centre in the 2005 County Retail Hierarchy and a Level 3 Town Centre in the 2008 GDA Retail Hierarchy.

The town is an attractive and vibrant centre attracting local people and visitors alike. It has a well maintained urban fabric and streetscape with a good mix of retail uses, offices, restaurants and bars. A consequence of its attraction and the high level of through traffic, the town centre still becomes congested although this issue has been considerably eased with the opening of the interchange and Outer Relief Road. The highest footfall levels and retailing activity are around the Liffey Bridge along Main Street.

Since the 2002 Census, Celbridge has sustained its position as the third largest settlement in the County growing by 40.5% from 12,289 to 17,262 over the period 1996 – 2006. Although the third largest town, Celbridge is the sixth largest retail centre in the County, a position it has sustained since the 2001 GDA Retail Strategy (the floorspace baseline for the 2005 Strategy). The town's total floorspace has increased to just under 6,740m² net, comprising 3,950m² (58.6%) convenience and 2,790m² (41.4%) comparison floorspace. These figures exclude vacant floorspace. This is an increase in total retail floorspace of 61.5% since 2001. The increase can be attributed to the expansion of the Tesco Shopping Centre and the introduction of Aldi to the town's retail offer. The remainder of the town's retail floorspace is a mix of a small number of symbol group stores and local independent shops and limited comparison shopping, comprising small independents and hardware outlets. This is the position that prevailed at the time of the 2005 Strategy, when it was highlighted that comparison floorspace was limited for a town of Celbridge's size and importance.

The 2001 GDA Retail Strategy floorspace survey identified that Celbridge had the highest level of vacancies (13.7%) of any of the County's towns. This had been redressed by the time the 2005 Strategy health check was undertaken with only two shops being vacant. The 2009 health check found that, although the number of vacant units had increased to four, vacancy levels were not an issue in the Core Retail Area.

The 2002 Celbridge Development Plan, 2005 County Development Plan and 2005 Strategy recognised that, for a centre of its size and potential, Celbridge was underperforming in terms of retail floorspace with proximity and accessibility to the higher order centres of Dublin City Centre, Liffey Valley and Blanchardstown being the key reason for its underperformance. This was particularly in respect of

comparison floorspace. In the interim period, the improvement in these centres and other centres, such as Maynooth, have reinforced the issues. Unless this is redressed, it is a position that is set to continue given the major zoned retail expansions of these centres. This is a key role of what the Donaghcumper Town Centre Expansion Area is designated to achieve, in compliance with the recently adopted 2010 Celbridge LAP and the 2007 Donaghcumper AAP.

5.1.2 Core Retail Area

Since the 2005 Strategy was prepared, there has been no expansion of the Core Retail Area of Celbridge Town Centre. The Core Retail Area of the town centre is illustrated in Figure 5.1. It comprises the area of Liffey Bridge along Main Street to south of Maynooth Road.

Figure 5.1 Celbridge Core Retail Area



5.1.3 Sequential Approach – Land Availability & Potential

As assessed in the 2005 Strategy, due to the nature and importance of the townscape, it is unlikely that any major expansion of retail and other town centre functions and attractions will be able to be realised within the heart of the town centre. However, as set out in the Donaghcumper AAP, there is now enhanced potential for the backland areas to the east/south east of the town centre to become a viable part of the town centre's expansion providing the linkage and connectivity required between the traditional town centre and the designated Donaghcumper Town Centre Expansion Area. This potential is more limited and difficult, but not impossible, in respect of the backlands to the west/north west of the Core Retail Area. Based on this, if Celbridge is to enhance its retail offer and importance then the following strategy requires to be adopted and progressed:

- The delivery of the Donaghcumper Town Centre Expansion Area, in accordance with the guidance provided in the recently adopted Celbridge LAP and the 2007 Donaghcumper AAP, with a particular emphasis in ensuring a critical mass of retail and town centre uses to the north/north west of the area to maximise connectivity and synergy with the current Core Retail Area. By this means, the expansion of the Core Retail Area will be achieved over the timescale and beyond of the new County Retail Strategy. Appropriate retail uses would be a large modern format foodstore and middle and lower order comparison shopping, but not excluding higher order comparison floorspace if identified as realisable by the market.
- The implementation of the Boylan's Garage Site permission to ensure the retail, non retail services and community needs of this large expanding south eastern residential area of the town are better met.
- An impetus given to the regeneration of the Mill Complex on the edge of the town centre as a new mixed use residential, commercial leisure and retail quarter, a potential that was identified in the 2005 Strategy. The importance and potential of this complex has been further reinforced in the Town Centre Objectives in the 2010 Celbridge LAP.
- Facilitation of enhanced linkage between the Tesco Shopping Centre and the Core Retail Area in applications for the redevelopment/regeneration of backlands to the north/north west of the Core Retail Area.
- Identification of a mix of neighbourhood and district centres within expanding residential areas of the town, in accordance with the 2005 County Development Plan and the provisions of the 2010 Celbridge LAP.

5.2 Kilcock

5.2.1 Health Check

Kilcock, with Celbridge, Leixlip and Maynooth, forms part of the Metropolitan Area Primary Dynamic Cluster in the RPGGDA 2004 – 2016 and the County Development Plan 2005 – 2011 settlement strategies. All of these centres are designated as Moderate Growth Towns in the County Development Plan settlement hierarchy and are close to the M4 Motorway. Kilcock is designated as a Level 3 Metropolitan Area Town Centre in the 2005 County Retail Hierarchy and a Level 3 Town Centre in the 2008 GDA Retail Hierarchy.

The former wealth of Kilcock as a market town is evidenced around the Market Square but this is one of the areas where there are vacancies and a number of dilapidated buildings. On the north side of the Royal Canal, the attraction of the waterfront environment is being capitalised on with bars and restaurants, albeit small scale to date. In recognition of the issues and opportunities that prevail, Kilcock was designated for urban renewal incentives under the County's Town Renewal Scheme (TRS). In the interim period, the effects of this designation have not materialised and the downward spiral of the Core Retail Area and wider town centre has grown in momentum.

Since the 2002 Census, Kilcock has become the ninth rather than the tenth largest settlement in the County growing by a significant 124.6% from 1,825 to 4,100 over the period 1996 – 2006, accounting for 2.2% of the County's population at 2006. However, although being the ninth largest settlement, it has dropped from being this in the County Retail Hierarchy to being thirteenth. This is as a result of the fact that there has been no new retail floorspace in the town since the 2001 GDA floorspace survey was undertaken. The town's total floorspace remains at 1,515m² net, comprising 660m² (58.0%) convenience floorspace, 555m² (42.0%) comparison and 300m² bulky goods. These figures exclude vacant floorspace. Existing facilities and businesses within the town centre include a service station, pharmacy, convenience

stores, bakery, coffee shop and a number of public houses, which reflect the general paucity of offer when set against the growing needs of the town and its catchment area's population. The convenience stores include small symbol group shops – Centra, Spar and Today.

The 2001 GDA Retail Strategy floorspace survey identified that Kilcock only had a vacancy level of 3.4%. The 2005 health check confirmed this with only two properties that had previously been shops being vacant at the time of the assessment. However, the 2005 Strategy highlighted that while vacancy levels in respect of retail floorspace may be low as a whole the town centre had a higher level of vacancies across its core and secondary area commercial property. As has been highlighted, this deterioration has grown in momentum, largely as a number of the buildings in the designated Core Retail Area were formerly primarily related to servicing the agricultural sector.

The 2005 Strategy recognised that in view of the poor attraction and weakness of Kilcock's retail offer then local people were having to travel to other centres to meet the majority of their shopping needs. It is a position that has been exacerbated in the interim years with the significant improvement in nearby Maynooth's offer – a centre at the same level in the GDA and County retail hierarchies – becoming a key shopping destination for people living in Kilcock and its catchment area. This noted, the retail potential of the town has been recognised in mixed use generally retail led applications for the regeneration of the heart of the town centre and the Zed Candy Site on the Enfield Road (R148), to the north of Kilcock Town Centre. The former was granted planning permission on appeal and the latter was refused consent by the Board.

5.2.2 Core Retail Area

Since the 2005 Strategy was prepared, there has been no expansion of the Core Retail Area of Kilcock Town Centre. The Core Retail Area of the town centre is illustrated in Figure 5.2. It comprises Bridge Street, New Lane and School Street.

Figure 5.2 Kilcock Core Retail Area



5.2.3 Sequential Approach – Land Availability & Potential

The 2005 Strategy highlighted that there required significant regeneration and environmental enhancement of Kilcock Town Centre. In the interim period, it is recognised that although there has been a significant relative increase in the town's population and market interest in the mixed use regeneration of key 'Town Centre' zoned sites, Kilcock Town Centre has witnessed further significant decline in its retail offer and attraction, reinforced by the continuing deterioration of the town centre environment and ambience. This is not consistent with the 2009 Kilcock LAP's objective of consolidating Kilcock as a self-sustaining town. To redress this, the County Retail Strategy for the way forward must, therefore, focus on:

- i. Encouraging and facilitating the comprehensive mixed use regeneration of Kilcock's Core Retail Area, with the key ingredient/catalyst being recognised as a strong retail anchor. This is a town that requires to re-establish the heart, dynamics and attraction of its former days as a market town;
- ii. Redressing the issues that underpinned the Board's decision to refuse the mixed use retail led regeneration of the Zed Candy Site;
- iii. Encouraging and facilitating the reuse and regeneration of key buildings and locations within and close to the Core Retail Area, with Market Square being of particular importance;
- iv. Actively pursuing through the market, the delivery of the LAP proposed retail park on Enfield Road notwithstanding that Maynooth may be the optimum location for redressing the deficiencies in modern format bulky goods retail floorspace that is deficient in North East Kildare. However, Kilcock, as part of the Maynooth 'zone of influence' may have greater potential with respect to the capacity of the road network to realising this objective; and
- v. Ensuring that local retail and non retail services needs are met in existing and expanding residential areas in a way that is '*efficient, equitable and sustainable*'.

5.3 Leixlip

5.3.1 Health Check

Leixlip, with Celbridge, Kilcock and Maynooth, forms part of the Metropolitan Area Primary Dynamic Cluster in the RPPGDA 2004 – 2016 and the County Development Plan 2005 – 2011 settlement strategies. All of these centres are designated as Moderate Growth Towns in the County Development Plan settlement hierarchy and are close to the M4 Motorway. Leixlip is designated as a Level 3 Metropolitan Area Town Centre in the 2005 County Retail Hierarchy but this has been reassessed in the 2008 GDA Retail Strategy which designates the town, including Collinstown, as the Level 2 Major Town Centre to serve North East Kildare. This reaffirms and clarifies the strategic retail policy objectives of both the 2001 GDA Retail Strategy and the 2005 County Development Plan. The 2008 GDA Retail Strategy identifies that this is likely to gradually occur over a twenty year timeframe.

The town is an attractive and vibrant centre but suffers from a good deal of congestion throughout the day. The town centre is characterised by a robust well maintained urban fabric and mix of retail uses, offices, bars and restaurants. It has the offer and ambience to attract both local people and visitors but parking and congestion are issues that serve to deter the town centre maximising its potential.

Since the 2002 Census, Leixlip has sustained its position as the fourth largest settlement in the County growing by 9.1% from 13,451 to 14,676 between 1996 – 2006, with the town accounting for 7.88% of the County's population at 2006. Based on its designation, including Collinstown, the recently adopted LAP projects that Leixlip's population will grow by 6,160 to 20,836 over the period 2006 – 2016, the end year of the LAP. The majority of this (60.0%) will be accommodated in the Collinstown area, which is the subject of a separate LAP – the recently adopted 2010 Collinstown LAP.

Although Leixlip has remained the fourth largest town in the County, it has dropped from being the fifth largest retail centre to eighth place since the 2001 GDA Retail Strategy floorspace survey was undertaken. The town's total floorspace has increased to 5,766m² net, comprising 3,453m² (59.9%) convenience, 1,913m² (33.2%) comparison and 400m² (6.9%) bulky goods. These figures exclude vacant floorspace. This is an increase in total retail floorspace of 28.7% since 2001 and is as a result of the new Lidl store on the Maynooth Road. Shops in the town centre are a mix of small symbol group and independent convenience and comparison stores with, as at the time of the 2005 Strategy, a high representation of commercial leisure and business and non retail services, particularly around the edges of the Core Retail Area. As was the position then, Leixlip's retail offer is limited for a town of its size and potential largely due to its proximity to Dublin City Centre, Liffey Valley and Blanchardstown. Today, Maynooth also would be an important shopping location for people in Leixlip. This issue will be significantly redressed over the next twenty years as Leixlip, with the development of Collinstown, grows into its role and status of a Level 2 Major Town Centre.

At the time of the 2005 Strategy health check, Leixlip had a vacancy rate of 6.3% which was not of a level to cause concern. However, the 2009 health check identified that there were nine vacant units in the town centre, with a small number of these having become derelict. This is a consequence of the small store formats and footprints that do not meet the needs of the modern retailer.

5.3.2 Core Retail Area

Since the 2005 Strategy was prepared, there has been no expansion of the Core Retail Area of Leixlip Town Centre. The Core Retail Area of the town centre is illustrated in Figure 5.3. It comprises Leixlip Road junction with Main Street/Captains Hill to Rye Bridge.

Figure 5.3 Leixlip Core Retail Area



5.3.3 Sequential Approach – Land Availability & Potential

As was recognised in the 2002 Leixlip LAP and the 2005 Strategy, Leixlip is too small a centre to meet the needs of its expanding population and has limited potential within the heart of the town for any substantial enhancement to be achieved. The major enhancement will be delivered through the designation of Collinstown as the Town Centre Expansion Area and this needs to be progressed in parallel to improvements within the traditional town centre. Based on this, the retail strategy for Leixlip (including Collinstown), is as follows:

- In accordance with the County Development Plan, 2008 GDA Retail Strategy and recently adopted Leixlip and Collinstown LAPs, Collinstown is the designated area for Leixlip's town centre expansion which will enable it to grow over the next twenty years into the Level 2 Major Town Centre to serve North East Kildare. It is envisaged that the centre may ultimately comprise some 65,000m² of comparison floorspace with associated ancillary non retail services and other town centre activities and be of the quality and importance of other GDA Level 2 Major Town Centres.
- There will be continued promotion of the enhancement and consolidation of the traditional heart of Leixlip Town Centre, including the creation of a new street between Captain's Hill and Mill Lane that will provide for a range of town centre uses including shopping, car parking, residential, educational and employment opportunities.
- In addition to encouraging the enhancement and expansion of the established neighbourhood scale centres at Confey and Louisa Bridge, it is not envisaged that there will be a requirement for additional neighbourhood centres in the town.
- Contrary to what was envisaged in the 2005 Strategy, additional retail warehousing is not part of the retail strategy for the town.

5.4 Maynooth

5.4.1 Health Check

Maynooth, with Celbridge, Kilcock and Leixlip, forms part of the Metropolitan Area Primary Dynamic Cluster in the 2004 RPPGDA and the 2005 County Development Plan settlement strategies. All of these centres are designated as Moderate Growth Towns in the County Development Plan settlement hierarchy and are close to the M4 Motorway. Maynooth is designated as a Level 3 Metropolitan Area Town Centre in the 2005 County Retail Hierarchy and a Level 3 Town Centre in the 2008 GDA Retail Hierarchy.

The town is an attractive and vibrant centre but, as was highlighted in the 2005 Strategy, it suffers from congestion at many times of the day which results in queuing along Main Street and routes into the town centre. The centre is characterised by a robust well maintained urban fabric and mix of retail uses, offices and bars with new residential estates located south of the town centre. Maynooth has also developed as an important University Town and is also renowned for St Patrick's College seminary.

Since the 2002 Census, Maynooth has sustained its position as the fifth largest settlement in the County growing by 25.6% from 8,528 to 10,715 over the period 1996 – 2006, with the town accounting for 5.7% of the County's population in 2006. Based on revised RPPGDA population projections, it is assumed that this position will be sustained and facilitated.

Maynooth has remained the fifth largest town and, in parallel, has replaced Athy as the third largest retail centre in the County since the 2001 GDA Retail Strategy floorspace survey. The town's total floorspace has increased to 22,988m² net, comprising 8,732m² (approximately 38.0%) of convenience and 14,266m² (62.0%) comparison floorspace. These figures exclude vacant floorspace. This represents a significant fourfold increase since the 2001 GDA Retail Strategy floorspace survey. As a result, Maynooth has

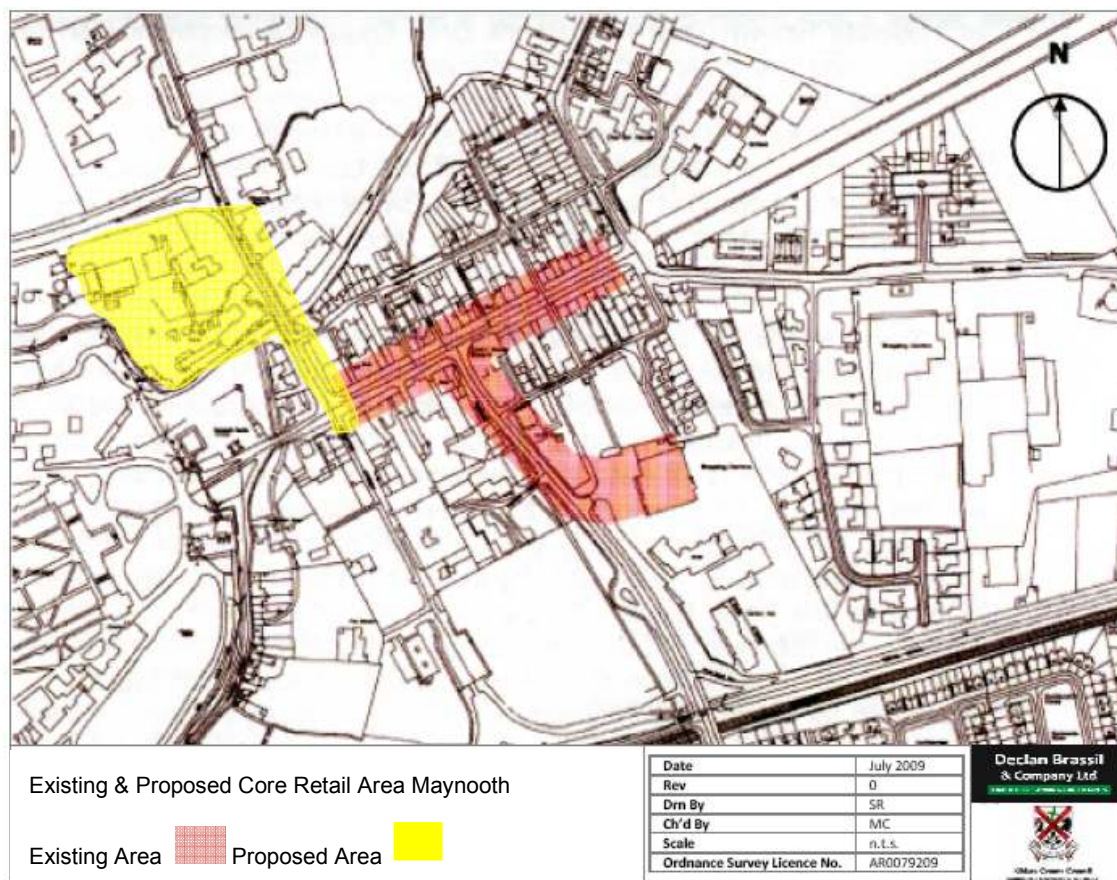
emerged as the third largest retail centre in the County. The increase can be attributed to the Dunnes anchored Manor Mills Shopping Centre, the Tesco anchored Town Centre Expansion Area, which included an expansion/redevelopment of the existing retail floorspace on the site and the introduction of Aldi and Lidl on the Clane and Straffan Roads respectively.

At the time of the 2005 Strategy health check, Maynooth had a retail vacancy rate of 11.5% which was viewed as higher than the vibrancy of the centre indicated. The 2009 health check identified that this position had not changed but the vitality and viability of the town remained strong. This is largely, as was the position in 2005, in view of the mix of uses including restaurants, cafes and public houses and the benefits of its important student population.

5.4.2 Core Retail Area

Since the 2005 Strategy was prepared, Maynooth's Core Retail Area has expanded to include the Manor Mills Shopping Centre. This is illustrated in Figure 5.4. The Core Retail Area now comprises Dillons Row along Main Street to the Leinster Street Junction and from Main Street to and including the Manor Mills Shopping Centre.

Figure 5.4 Maynooth Current Core Retail Area & Proposed Extension



reflected in the out of centre Greenfield and Glen Royal Shopping Centres schemes and the need to designate the Tesco anchored Town Centre Expansion Area. As identified in the 2002 Maynooth Development Plan and the 2005 Strategy, the key area in the town centre for further retail and town centre development is the Harbour Area, for which an AAP was prepared in February 2006, with backlands at Doctors Lane providing scope for more limited development. The delivery of these areas will need to address the congestion which prevails in Maynooth Town Centre.

Looking to the future, unless further out of centre locations are identified for retail development then Maynooth will have considerable difficulty in growing its retail offer. This was an issue identified during the preparation of the 2005 County Development Plan. Additionally, the review of the 2005 Strategy has also identified that with the significant mainstream comparison shopping enhancement of Maynooth, the designation of Leixlip (including Collinstown) as the Level 2 Major Town Centre and emerging proposals in both Celbridge and Kilcock then the high levels of comparison expenditure leakage from North East Kildare will be enabled to be significantly redressed. However, the North East of the County has a very limited retail warehousing offer which unless redressed will remain a sector from which comparison leakage continues. Although retail warehousing is permissible in the Leixlip/Collinstown Town Centre Expansion Area, there is scope and potential for Maynooth to become the key centre in the area to deliver bulky goods retail floorspace. This requires to be examined and lands appropriately zoned in the programmed review of the 2002 Maynooth Development Plan. Adoption of this approach will contribute to the overall reduction in comparison expenditure leakage from the North East of the County.

5.5 Straffan

5.5.1 Health Check

Straffan is designated as a Hinterland Area Key Village in the County Development Plan and sits close to the edge of the GDA Metropolitan Area near Celbridge. As was the position with many centres of this scale and nature, Straffan was not specifically identified as a centre at this level in the Regional Settlement Hierarchy in the 2004 RPPGDA nor as a Level 4 centre in either the 2001 or 2008 GDA Retail Hierarchies. The latter reflects the position that the identification of specific centres was left to the individual planning authorities in the GDA in both strategies. It is designated as a Metropolitan Area Level 4 Village Centre in the 2005 County Retail Hierarchy.

Since the 2005 Draft Retail Strategy was prepared, and the new centres introduced in the new County Retail Strategy, Straffan has declined from being the eighteenth largest settlement in the County to twenty-fourth, when the additional main centres are included. Its population grew by 28.7% to 439 between 1996 – 2006.

Straffan is a very limited village centre in terms of both retail floorspace and other services but benefits from its association with the 'K Club', the internationally known golf and country club. Commercial/retail floorspace comprises a small symbol group Mace within the Maxol garage, an independent butchers and the Straffan Inn. In addition, a small development of two retail units have been completed but at the time of the health check remained vacant. Straffan was not included as one of the centres in the 2001 GDA Retail Strategy floorspace survey and, as such, was not incorporated in the 2008 review of the Regional Retail Strategy.

5.5.2 Core Retail Area

At the time of the preparation of the 2005 Strategy, it was assessed that Straffan's retail floorspace was limited and widely distributed around the village centre and, as such, it did not have what could be defined as a Core Retail Area. This is the position that remains in place at the time this Retail Strategy was being prepared.

5.5.3 Sequential Approach – Land Availability & Potential

Straffan, in view of the limited opportunities and constraints to accommodate any additional development – as recognised in the 2005 Strategy, is unlikely to see any development of major retail floorspace, although there may be opportunities for tourism related development generated from its profile and association with the *K Club*. These will require to be assessed on their merits and against existing and emerging Village Plan zonings and objectives. Overall, Straffan – in view of its nature and context – is unlikely to witness any significant improvement in its retail offer or potential. As such, local people in the village and its catchment area will have to continue to travel to higher order centres to meet the majority of their shopping needs.

6.0 RETAIL DEVELOPMENT POTENTIAL – CENTRAL AREA

The towns and main centres in the Central Sub-County Area are:

- i. Naas;
- ii. Newbridge;
- iii. Kilcullen;
- iv. Clane;
- v. Sallins;
- vi. Prosperous;
- vii. Johnstown;
- viii. Kill;
- ix. Ballymore-Eustace;
- x. Athgarvan;
- xi. Derrinturn;
- xii. Allenwood; and
- xiii. Killeel.

6.1 Naas

6.1.1 Health Check

Naas forms part of the RPPGDA Hinterland Area Primary Dynamic Cluster comprising the towns of Naas, Newbridge and Kilcullen and is designated as the only Large Growth Town Type (1) 'Satellite Town' in the County in the guidelines. These designations have been adopted in the County Development Plan 2005 – 2011. It is also a Level 2 Tier 3 centre in the national retail hierarchy and designated as a Hinterland Area Level 2 Twin Major Town Centre in the County Development Plan and the 2005 Strategy and a Level 2 Major Town Centre/County Town Centre in the 2008 GDA Retail Strategy. Under the Council Specific Policy Recommendations (Page 77), the Regional Retail Strategy promotes the following in respect of Naas:

'To promote and encourage the enhancement and expansion of retail floorspace in the County Town of Naas to reflect its role as a major town centre and the significant population growth experienced in the past decade and to create a thriving active town centre.'

Naas is the administrative capital of Kildare and one of the two towns in the County where the Town Council is a Local Planning Authority. It also has the Southwest Area Health Board, the divisional headquarters of the Garda Síochána, Court Services and Naas General Hospital. It is a busy and thriving town centre, renowned for its historical street network and architectural heritage, which has benefited in recent years from a number of successful urban renewal projects, including improvement works to the front of the Courthouse and at Poplar Square. Naas Town Centre is a popular destination for eating, meeting and greeting and has a range of hotels, restaurants, cafes and public houses and high quality fashion shopping, drawing trade from its affluent hinterland and the variety of important race meetings hosted at Punchestown racecourse. The 2005 Naas Development Plan, which is currently under review, and the

2005 Strategy identified the potential for the expansion of this retail-leisure/tourism sector. Related to this, both also highlighted the scope and potential that can be harnessed around the Grand Canal spur and Harbour in the creation of a new waterfront quarter.

The town centre is characterised by an elongated main street which served as the main road to Waterford from Dublin until it was bypassed by the N7/M7 during the 1980s. While the bypass significantly improved traffic conditions, over the interim years the congestion in the town centre has self-perpetuated largely due to the significant population increase that the town has witnessed. The growth has taken place predominantly in the town's significantly expanding suburbs which to date continue to provide limited shopping or other services and, as such, people continue to have to converge on the town centre to meet these needs. In response, the 2003 Naas Integrated Development Framework for Land Use and Transportation (IFPLUTS) was prepared by the Council, in conjunction with the DTO, which provided the vision for Naas to 2020 and more recently the 2007 Naas Traffic Management Plan was completed.

Since the 2002 Census, Naas has sustained its position as the largest town in the County growing by 42.4% from 14,074 to 20,044 over the period 1996 – 2006, accounting for 10.7% of the County's population at 2006. The population targets for the town over the period of the County Development Plan and Naas Development Plan will be determined in the preparation of both plans. This noted, a key area for further growth will be in the 250ha North West Quarter Masterplan Area.

Although the largest town in the County, Naas had until recently been second to Newbridge in respect of its quantum of retail floorspace. However, this position has changed and as a result of the Globe and Newhall retail parks, new convenience floorspace and the Corban's Lane/Naas Shopping Centre, which is currently under construction, Naas has emerged as the largest retail centre in the County with a total floorspace of 48,596m² net, comprising 10,086m² (20.7%) convenience, 17,172m² (35.3%) comparison and 21,416m² bulky goods (44.0%). These figures exclude vacant floorspace. This is a significant increase of almost fivefold since 2001. This is largely as a result of the substantial improvement in Naas' quantum of retail park/bulky goods floorspace rather than its middle and higher order comparison shopping offer. Bulky goods floorspace currently accounts for 44.0% of Naas' total retail offer.

The 2001 GDA Retail Strategy floorspace survey identified that Naas had less than 2.0% of its total floorspace vacant – an almost negligible amount. The 2009 health check found that this position had changed with vacancies having considerably increased, a matter of concern in the town. However, while the vacancy levels are an issue that requires to be addressed, they are not deemed to prevail at a significant level in the context of town centre vitality and viability.

Naas' retail floorspace is set to further grow with the planning consents for the Monread Road District Centre (6,227m² net) and the adjacent mixed use scheme (8,027m²) and the small Fishery Lane Neighbourhood Centre. These schemes will increase Naas' net retail floorspace to over 63,000m².

However, quantum is not the only issue in respect of GDA Level 2 centres if they are to sustain and improve their attraction and competitiveness. This must be married with quality, particularly in respect of mainstream comparison floorspace. Although it has been highlighted that Naas is renowned for its quality women's clothes and shoe shops, as at the time of the 2005 Strategy it still is underperforming as mainstream comparison shopping destination – people are still having to travel to meet these needs, albeit that with the opening of Whitewater Shopping Centre in Newbridge and the KVOC not all of these trips are now to the Dublin conurbation and beyond. The large multiple anchored Naas Shopping Centre with 43 mall units being constructed at Corban's Lane and the granted mixed use scheme on Monread Road will help to redress the issue but, as with Newbridge, Naas also needs to see internationally operated department stores in the town centre if it is to really realise its role and importance as a Level 2 centre in the County and wider GDA.

Since 2001, Naas has witnessed an improvement in its convenience offer through the introduction of Marks and Spencer *Simply Food*, which anchors the Naas Town Centre scheme, and Aldi and Lidl on the

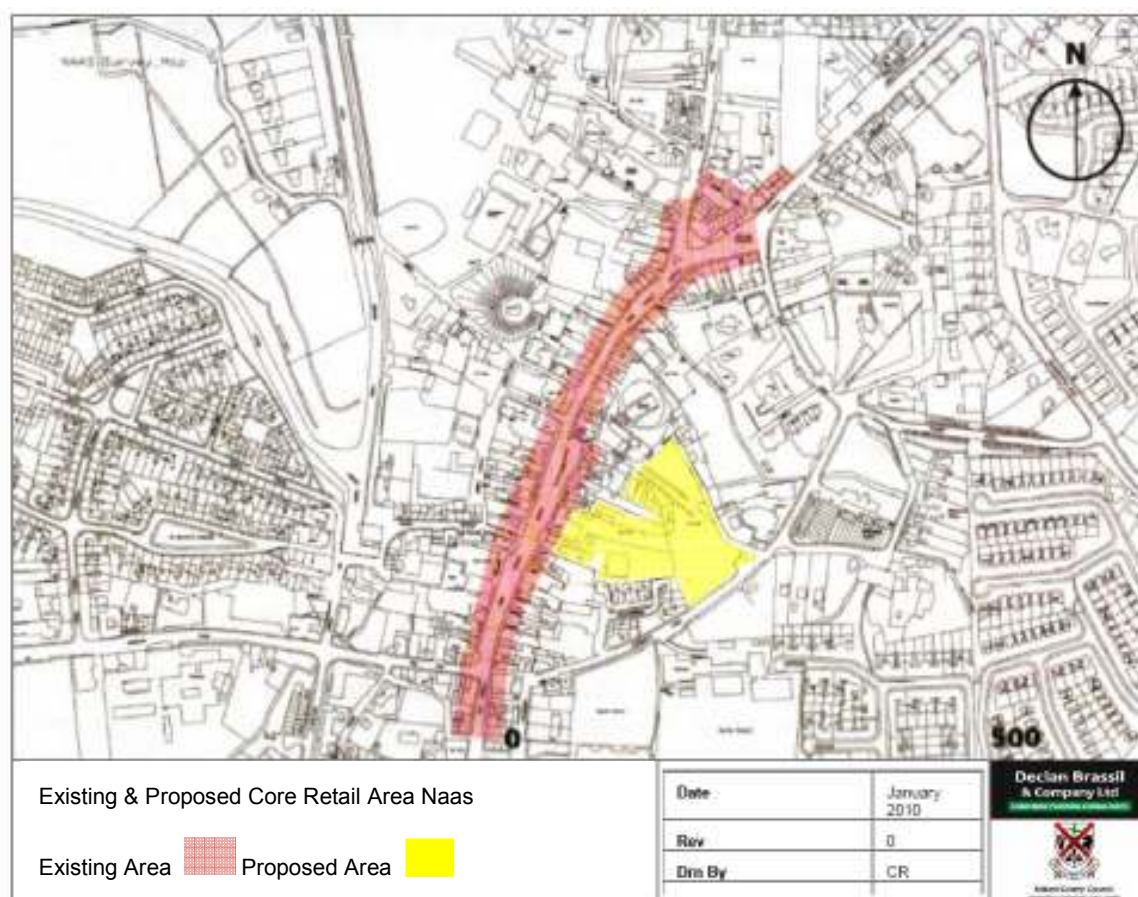
Newbridge Road but its main food convenience floorspace still has not experienced the significant improvement envisaged or required. Main food convenience shopping in the town is generally of poor quality and format which encourages people to travel elsewhere, particularly Newbridge, to meet these needs. It is a position, however, which should change through the opening of the large multiple anchor in the new Naas Shopping Centre, implementation of the Monread District Centre permission and the current proposed relocation of Superquinn from the town centre to the former VEC Site on Newbridge Road. The latter two proposals provide the potential to open up retail development opportunities within and on the edge of the town centre.

Naas has become one of the key bulky goods shopping destinations in the GDA since the 2005 Strategy was prepared through the Newhall and Globe Retail Parks. However, this has become an increasingly difficult market in view of general overprovision of floorspace and the fact that the required DIY anchors and other bulky goods operators generally operate on a regional/sub regional rather than town basis. As such, there has been pressure to relax the nature of the users on retail parks whether that be mainstream large space user comparison brands or discount foodstores. It is an issue that requires to be addressed in the new County Retail Strategy.

6.1.2 Core Retail Area

Since the 2005 Strategy was prepared, Naas' Core Retail Area has not expanded. However, the opening of the Naas Shopping Centre on South Main Street/Corban's Lane will result in the extension of the Core Retail Area and this is illustrated in Figure 6.1. The Core Retail Area now comprises Poplar Square along Main Street North and Main Street South to the Fairgreen and covering the Naas Shopping Centre.

Figure 6.1 Naas Current Core Retail Area & Proposed Extension



6.1.3 Sequential Approach – Land Availability & Potential

It is recognised by Naas Town Council that realising new retail development in Naas Town Centre may pose challenges. However, in respect of delivering a critical mass and quality of mainstream comparison floorspace then the town centre must be the priority location if it as a whole is to benefit through enhanced footfall and vitality. Both the Naas Town Centre and Naas Shopping Centre schemes demonstrate what can be achieved. This progress needs to be built on and there are a number of key opportunities:

- The Canal Harbour area has been previously identified as a location for a mixed use expansion of the town centre. This position remains and requires to be reinforced and progressed through *Town Centre Development Plan* zonings being extended to cover the area to facilitate the creation of a new mixed use and vibrant '*Urban and Cultural Quarter*' in the town centre which helps realise the tourism potential of the town's waterfront. A key objective must be securing the area's better linkages with the heart of the town centre and wider town, and in the context of the latter specifically the developing North West Quadrant Area and nearby neighbourhoods as it provides the link for integration that is currently lacking. Given the very important heritage and environmental attributes of the Canal Harbour area, these require to be both respected and harnessed. The appropriate mechanism for this should be through an Urban Design Framework Strategy, which has an emphasis on a high quality of design in terms of buildings, linkages and the public realm and extending the ambience of the compactness of the urban form of this part of the town. In retail planning terms, the main driver for the successful and sustainable retail expansion of the town centre to the Canal Harbour area is through ensuring a critical mass of retail floorspace/attractors within the area and between the area and the main footfall of the town centre.
- The Superquinn Site on Main Street may be released with the proposed relocation of operations to the VEC Site on Newbridge Road.
- The existing Tesco/Penneys Shopping Centre on the Dublin Road.
- As has been identified in the 2005 Development Plan, while it is recognised that there are likely to be challenges in terms of costs and timescales, it is a priority that there is re-use and regeneration of backlands to the rear of buildings on Main Street, both North and South, for retail and other town centre uses to ensure the unique ambience of the town centre is captured. Again, where retail development is involved it will require to be well anchored if its viability is to be realised and sustained.

It has been identified that the convenience shopping offer of the town requires to continue to witness enhancement, particularly but not exclusively in respect of main food shopping. In addition to the Monread Road District Centre and proposed relocation of Superquinn to the VEC Site, as was promoted in the Development Plan and 2005 Strategy, there is a need to provide new retail centres in existing or emerging residential areas, with the North West Quadrant and Canal Harbour being such areas. The Naas Town Development Plan, guided by the RPG, 2008 GDA Retail Strategy and this Retail Strategy, sets out the relevant criteria against which the Planning Authority will assess all future retail applications.assessment criteria for retail developments. Additionally, for large employment areas to be attractive to investors, employers and workers evidence from around the country is that convenience and non retail services needs require to be met in such areas, albeit it on a local scale.

Reflecting the high level of new retail warehousing floorspace in the town, it is not envisaged that there will be demand for additional bulky goods retail floorspace in the foreseeable future. It is a position that will require to be monitored.

6.2 Newbridge

6.2.1 Heath Check

Newbridge forms part of the 2004 RPPGDA Hinterland Area Primary Dynamic Cluster comprising the towns of Newbridge, Naas and Kilcullen and is designated as the only Large Growth Town Type (2) in the County in the guidelines. These designations have been adopted in the 2005 County Development Plan. It is also a Level 1 Tier 3 centre in the national retail hierarchy, which is the level above Naas and the one below the regional capitals of Cork, Galway, Limerick and Waterford. After the regional capitals, it is therefore one of the most important centres in the country. Newbridge, as with Naas, is designated as a Hinterland Area Level 2 Twin Major Town Centre in the County Development Plan and the 2005 Strategy and a Level 2 Major Town Centre/County Town Centre in the 2008 GDA Retail Strategy. Under the Council Specific Policy Recommendations (Page 77), the Regional Retail Strategy promotes the following in respect of Newbridge:

'To support the attractiveness and viability of the key linked towns of Newbridge and Kilcullen, which form along with Naas a 'Primary Dynamic Cluster' in the RPGs, and to encourage the regeneration of land and buildings in the town centres to provide opportunities for further mixed use developments; and to enhance the vibrancy of the town centres.'

It is a linear town with the commercial town centre spreading from the bridge over the River Liffey to the south west along the former N7 to the bridge over the Limerick/Cork railway line. Although no longer on the main road south, Newbridge continues to be congested particularly along Main Street largely due to the traffic generated by the shopping centres, foodstores and retail warehousing within the town centre. This issue has been examined in respect of traffic management in the Newbridge-Kilcullen IFPLUTS, which is currently being prepared by the Council, in conjunction with the DTO. The IFPLUTS has a timeframe of 2020 and, with the new County Development Plan, will inform the programmed review of the 2003 Newbridge LAP.

At the time that the 2005 Strategy was being prepared, it was identified that although the town centre had a number of focal points such as the Riverbank Arts Centre, it has no real focus or critical mass. This position has significantly changed with the Main Street being punctuated by a suite of important new retail and town centre developments, with the most important being Whitewater Shopping Centre, the adjacent Penneys' store, the Tesco superstore and Woodies DIY store. The Whitewater Shopping Centre has been a major catalyst for the enhancement of the ambience and attraction of Newbridge Town Centre which has increased footfall and town centre activity generally. There, however, remain older shopping developments along the Main Street that continue to detract from its generally good visual quality these include the Ballymany and Dunnes anchored Moorefield Shopping Centres and old format retail warehousing in the Newbridge Retail Park/Shopping Centre. Additionally, there are concerns that the Edward Street/ North Main Street/Charlotte Street/Eyre Street area has lost its retail/town centre role and importance and has failed to benefit/integrate with the major enhancement of the remainder of Newbridge Town Centre.

Since the 2002 Census, Newbridge has sustained its position as the second largest town in the County growing by 38.6% from 13,363 to 18,520 over the period 1996 – 2006, accounting for 9.9% of the County's population at 2006. The population targets for the town over the period of the County Development Plan will be determined in the preparation of the Plan.

Although the second largest town in the County, until recently Newbridge was the largest retail centre. However, developments in Naas since the 2001 GDA Retail Strategy floorspace survey was undertaken have resulted in Naas overtaking Newbridge quantitatively in respect of retail floorspace. The town's total floorspace is 40,572m² net, comprising 7,236m² (17.8%) convenience, 24,899m² (61.4%) comparison and 8,437m² bulky goods (20.8%). These figures exclude vacant floorspace. This is a large increase of over 88.0% in total retail floorspace since 2001 which is largely attributable to the Whitewater Shopping Centre

and the Penneys' department store on Main Street. Newbridge's retail profile is what generally characterises higher order retail centres around the country.

The 2001 GDA Retail Strategy floorspace survey identified that Newbridge had just over 2.0% of its total floorspace vacant – an almost negligible amount. The 2009 health check found that although there was an increase in vacant floorspace it was not of a level to cause concern and did not detract from the ambience and vitality of the town centre.

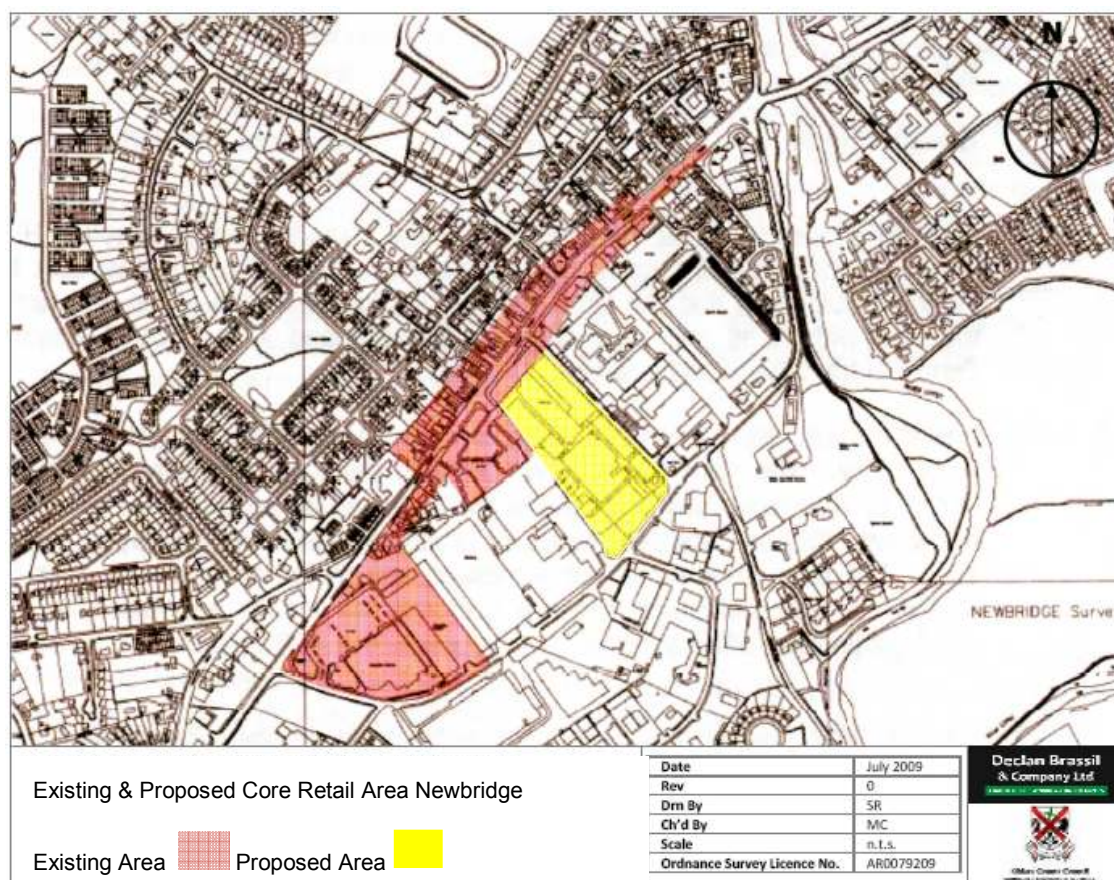
As has been highlighted, quantum of retail floorspace is not necessarily what makes a good retail centre, it is the quality of the offer. Whitewater Shopping Centre is well designed and highly successful, the latter largely due to the strength and attraction of its Marks and Spencer and Debenhams Stores' anchors. These were the first entry of either of these international department stores outside of the Dublin conurbation or the regional capitals. This combination makes Whitewater a destination and among the top in the GDA and further afield. It is clear from the health check that it is having a beneficial effect on other shops and the restaurants and cafés in its immediate zone of influence – these benefits require to be spread throughout the town centre by facilitating enhanced linkages along Main Street and to the Edward Street/Main Street North/Charlotte Street/Eyre Street area.

Newbridge, while benefitting from a modern format Tesco and a Lidl, still requires to see an improvement in its convenience offer. The town has not witnessed an improvement in its retail warehousing offer since the 2001 GDA Retail Strategy floorspace survey, and with the exception of Woodies DIY, it is not generally a quality offer. There is also the question of whether retail warehousing is an appropriate use of prime town centre lands in a GDA Level 2 centre where mainstream comparison shopping is the key priority. Given, as has been noted, that bulky goods retailers generally operate on a sub regional/regional basis then for the foreseeable future it is unlikely that Newbridge will see any substantial improvement in its bulky goods offer in view of the proximity of Naas' quality retail parks.

6.2.2 Core Retail Area

Since the 2005 Strategy was prepared, Newbridge's Core Retail Area has expanded with the development of the Whitewater Shopping Centre, which has become the prime pitch in the town centre. This is illustrated in Figure 6.2 which identifies it is proposed that the Core Retail Area now comprises Whitewater Shopping Centre, Town Square along Edward Street and Main Street to Riverbank Arts Centre.

Figure 6.2 Newbridge Current Core Retail Area & Proposed Extension



6.2.3 Sequential Approach – Land Availability & Potential

Unlike Naas and the majority of higher level towns in the GDA and wider country, Newbridge has the scope and potential to significantly expand its retail and town centre offer within the heart of Newbridge Town Centre in view of the quantum and proximity of former industrial lands. An important component in this mixed use equation has been the opening of the cinema as part of the second phase of the Whitewater scheme. This has been an important addition to the town centre and has greatly increased night time activity to the benefit of other commercial leisure in Newbridge Town Centre.

In addition to the former industrial lands, the upgrading/redevelopment of the Moorefield/Dunnes Shopping Centre and adjacent lands are key opportunities for further expansion and improvement of the heart of the town centre. This would serve to consolidate it and provide the basis for enhanced linkage between the different parts of Main Street. There also requires to be better linkage and integration of the Edward Street/Main Street North/Charlotte Street/Eyre Street area with the remainder of the town centre in order that the vitality and viability of this important part of the traditional town centre is realised. These require to be objectives of the new County Retail Strategy and ones that should be incorporated in the programmed review of the 2003 Newbridge LAP.

There is also the requirement of ensuring that the retail needs of Newbridge's existing and expanding residential areas are responded to through the provision of retail centres, whether they be district, neighbourhood or local centres in the review of the LAP, noting that such centres have to differing degrees wider non retail services and community services functions than just shopping. This was adopted policy in the 2005 County Development Plan but has not been progressed in the interim period. The review of the LAP needs to provide the guidance and land use zonings for this to be achieved. Additionally, as with

Naas, for large employment areas to be attractive to investors, employers and workers, evidence from around the country is that convenience and non retail services needs require to be met in such areas, albeit it at a local scale.

The 2005 Strategy specifically identified the scope and potential for retail warehousing/retail parks to be located on the periphery of the town centre expansion area. This was not adopted into the retail policies for Newbridge in the County Development Plan. The Plan's approach is the one that should be adopted into the new County Retail Strategy, largely in view of the following influences and considerations:

- The greater desirability of densification of retail and town centre uses on town centre lands – urban compactness creates the potential for a balance of spaces and places that traditionally characterised larger town centres
- The actual market for further large scale retail parks within the Naas/Newbridge/Kilcullen Primary Dynamic Cluster area, at least for the foreseeable future
- Development economics – town centres generally have higher land values which undermine the viability of bulky goods floorspace, with Blanchardstown Town Centre being a prime example where the large space requirements of mainstream comparison/high street brands have been replacing the bulky goods operators but set in a retail park format that does not integrate well with the Core Retail Area which is essentially the town centre.

6.3 Kilcullen

6.3.1 Health Check

Kilcullen forms part of the RPPGDA Hinterland Area Primary Dynamic Cluster comprising the towns of Kilcullen, Naas and Newbridge and is designated as a Hinterland Area Moderate Growth Town in the County in the current guidelines. These designations have been adopted in the 2005 County Development Plan. It is designated as a Hinterland Area Tier 2 Level 3 Centre in the County Development Plan and the 2005 Strategy and a Level 3 Town Centre in the 2008 GDA Retail Strategy. The Council Specific Policy Recommendation in the Regional Retail Strategy relating to Kilcullen, as part of the RPPGDA Primary Dynamic Cluster, has been set out above under paragraph 6.2.1.

Kilcullen was designated for urban renewal incentives under the Council's TRS. The town centre has witnessed moderate development over the past 5 years with the development of small scale but important retail and other town centre schemes. This is largely disjointed with developments both sides of the river which generally undermine a focus/critical mass at the heart of the town. It would be concluded that, while Kilcullen is part of the Naas/Newbridge Primary Dynamic Cluster, on the whole it is a dormitory town for these larger centres.

Although the M9 bypass, formerly the N9, significantly relieved the traffic congestion that previously prevailed, it is recognised that traffic volumes continue to increase. The issue is being examined in the joint Council and DTO Newbridge-Kilcullen IFPLUTS which seeks to provide the guiding principles for the town over the period to 2020.

Since the 2002 Census, Kilcullen has enhanced its position from being the fifteenth to the twelfth largest settlement in the County growing by 86.1% from 1,604 to 2,985 over the period 1996 – 2006, accounting for 1.6% of the County's population at 2006. The 2008 LAP projects that over the period of the Plan the population will increase to 3,088. It is the twelfth largest town in the County and this is mirrored in its position in the size hierarchy of retail centres. Kilcullen's current total floorspace is **1,805m²** net, comprising **1,106m²** (61.3%) convenience floorspace and **699m²** (38.7%) comparison. These figures exclude vacant floorspace. It is a 53.0% increase in total retail floorspace since the 2001 GDA Retail Strategy baseline was established.

The 2001 GDA Retail Strategy floorspace survey identified that Kilcullen had no vacant retail floorspace. However, at the time of the 2009 health check, vacancies had increased to nine generally dispersed around the town with seven along Main Street and two in the Hilltop scheme, facing on to the Naas Road. The vacancies although dispersed undermine the ambience of the town centre.

At the time of the health check underpinning the 2005 Strategy, Kilcullen was identified as having a limited retail and services offer, albeit it being a busy and diverse small town with a mix of services including business services, restaurants, cafes, bars, community facilities and a livestock mart. In the interim period, the Mart has closed but the town still sustains of the order of thirty shops and non retail services outlets. Its offer has been improved with the Market Square development which is a mixed use development comprising 180 apartments, offices and restaurant and retail units on the ground floor. In addition, there has been the development of a parade of new retail units fronting Hill Street, they largely include small boutiques and local non retail services providers, anchored by a Centra symbol group store. The main shopping areas within the town would appear to be around Euro Spar (formerly SuperValu) and Nolan Butchers along the southern end of the town, this trend has remained unchanged since the preparation of the 2005 Strategy. The local focus on provision and relative underperformance would be taken to reflect Kilcullen's proximity and relative dormitory role to both Naas and Newbridge.

Although there have been improvements, for a centre of the size and potential of Kilcullen and its catchment area, it needs to see an enhancement of its retail offer – particularly convenience if it is to become more self sufficient and greatly improve its role and potential as part of the Primary Dynamic Cluster.

6.3.2 Core Retail Area

At the time of the preparation of the 2005 Strategy, it was assessed that Kilcullen's retail floorspace was limited and widely distributed around the town centre and, as such, it did not have what could be defined as a Core Retail Area. This is the position that remains in place at the time the Retail Strategy was being prepared.

6.3.3 Sequential Approach – Land Availability & Potential

Although there is a need for Kilcullen to become a more self sustaining part of the Primary Dynamic Cluster, in terms of any significant retail development its potential is assessed as being relatively limited but the asset of its rich built and natural heritage and tourism potential is recognised. The emphasis is on mixed use town centre development that will underpin and secure the redevelopment/regeneration of key sites and consolidate the heart of the town, with the most important being the former Mart Site. As set out in the 2008 Kilcullen LAP, the framework for this requires to be provided by a vision led masterplan. In addition, the retail strategy for the town promotes the principle of ensuring that retail needs respond to population growth and meeting these in a way that is *efficient, equitable and sustainable*. The enhancement of Kilcullen's main food shopping offer in particular requires to be improved if needs are to be better met locally.

6.4 Clane

6.4.1 Heath Check

Clane was designated as a Hinterland Area Small Town in the 2004 RPPGDA and 2005 County Development Plan settlement strategies, a Hinterland Area Tier 2 Level 3 Town Centre in the 2005 County Retail Hierarchy. In the interim period, reflecting its strategic location, the growth in importance of the town and its size and functions, it was recognised and designated as a Level 3 Town Centre/Sub County Town Centre in the 2008 GDA Regional Retail Hierarchy.

The 2005 Strategy identified that the town had a compact linear town centre and no real defined heart within the town centre, extending along one main street. The town has grown in population but not in functions and character. Its ambience is further eroded by the traffic congestion that prevails, particularly during peak periods, although this has been relieved with the opening of the Inner Ring Road. Congestion is exacerbated by on street parking.

Since the 2002 Census, Clane has sustained its position as the eighth largest settlement in the County growing by 58.6% from 3,126 to 4,968 over the period 1996 – 2006, accounting for 2.67% of the County's population at 2006. Based on revised RPPGDA population projections, it is assumed in the 2009 Clane LAP that Clane would continue to account for 2.67% of the County's population and thus would grow by 2,310 to 7,278 over the period 2006 – 2016. The existing and projected population of the town reinforces its potential as a new Level 3 Sub County Town Centre in the County Retail Hierarchy.

Although the eighth largest town in the County, Clane is ranked eleventh in terms of the quantum of its retail floorspace in the County context. This, however, is an improvement of its position at fourteenth at the time the 2005 Strategy was being prepared, based on the 2001 GDA floorspace survey. The town's total retail floorspace is assessed as 3,590m² net, comprising 2,805m² (78.1%) convenience floorspace and 785m² (21.9%) comparison, a total increase of between four and fivefold since 2001. These figures exclude vacant floorspace. The increase can be attributed to the introduction of Tesco and the Aldi and Lidl discounters to the retail offer of the town and the mixed use The Village Centre scheme on the junction/corner of Main Street and the Prosperous Road.

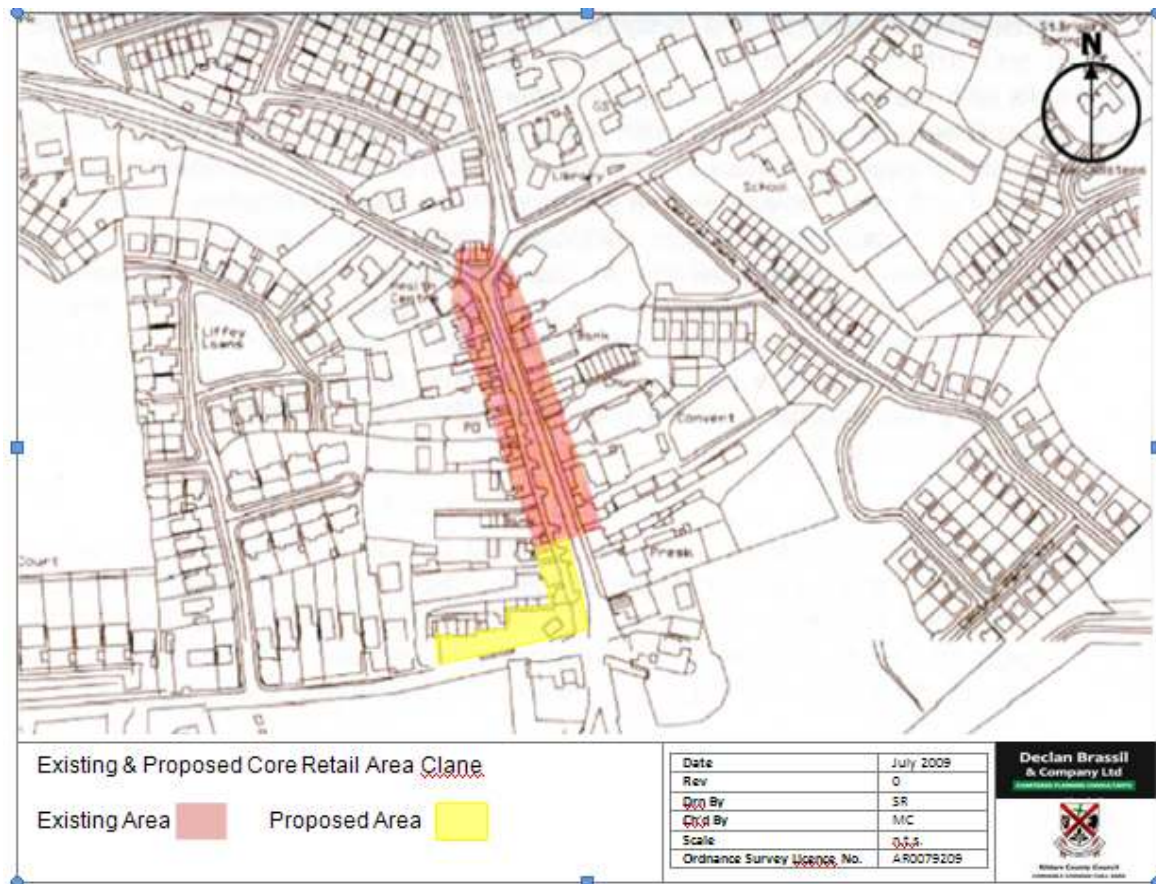
The 2001 GDA Retail Strategy floorspace survey identified that Clane had a 4.7% vacancy rate. At the time of the 2009 health check, there were five vacant units with vacancies generally dispersed around the town centre.

Existing shops and services in the town centre include: Aldi; Lidl; SuperValu; Tesco; a service station, pharmacy; cafes; an O'Briens sandwich bar; florists; butchers; wine shop; stationers; bathroom shop; hair salons; credit union; auctioneers/estate agents; restaurants; and: a number of public houses. Much of the recent development in Clane Town Centre has taken place along Main Street with The Village Centre development being an important addition. However, for a centre of its importance, Clane's comparison and services sector offers are limited, with the latter identified as an issue in the LAP.

6.4.2 Core Retail Area

Since the 2005 Strategy was prepared, Clane's Core Retail Area has expanded through the new development at the corner of Main Street/Prosperous Road. This is illustrated in Figure 6.4. The Core Retail Area now comprises Main Street, from the north side of the Prosperous Road to the Celbridge/Kilcock Roads junction.

Figure 6.3 Clane Current Core Retail Area & Proposed Extension



6.4.3 Sequential Approach – Land Availability & Potential

Although Clane has witnessed a significant improvement in its retail offer, it requires to continue to grow its quantum and quality of floorspace. There is a need in particular for an enhancement in the town's comparison offer if Clane is to fulfil its role as a Level 3 Sub County Town Centre. The focus for improvement is through the regeneration of backland and infill sites but there is a lack of key opportunities for any substantial expansion, as is recognised in the 2009 Clane LAP. This was an issue identified in the 2005 Strategy. Well located sites, with strong connectivity/linkage to the town centre need to be identified. In addition, opportunities are required to be identified in existing and expanding residential areas and proposals need to include shopping and other local and supporting services infrastructure if these communities are to develop a heart.

6.5 Sallins

6.5.1 Heath Check

Sallins is designated as a Hinterland Area Small Growth Town in the 2004 RPPGDA and 2005 County Development Plan settlement strategies and a Hinterland Area Tier 1 Level 4 Small Town Centre in the 2005 County Retail Hierarchy. It is not specifically designated at any level in the 2008 GDA Retail Hierarchy but its 2005 County Retail Hierarchy status remains important and in force.

Based on its strategic accessibility by road and rail to the Metropolitan Area and its functional relationship with Naas, Sallins has become increasingly attractive to commuters. The railway station, which has

national and regional rail services, and access to the M7 are important strategic assets and drivers of the town's growth. This is set to continue and is recognised in the 2009 Sallins LAP. Although Sallins is closely linked to Naas, and as such the Naas-Newbridge-Kilcullen Primary Dynamic Cluster, it is a separate town with its own specific needs and the LAP and Naas Town Development Plans' zonings seek to prevent the coalescence of the two towns. The growth of the town and its location on the current regional link road between the M4 and N7 motorways have resulted in Sallins experiencing significant congestion in view of the high levels of through traffic. This will be redressed through the implementation of the proposed Sallins Bypass.

Since the 2002 Census, Sallins has dropped from being the ninth largest settlement in the County to tenth. This noted, the town's population grew by a significant and unprecedented 345.7% from 854 to 3,806 over the period 1996 – 2006, accounting for 2.04% of the County's population at 2006. Based on revised RPGGDA population projections, it is assumed in the 2009 Sallins LAP that the town would continue to account for of the order of 2.04% of the County's population and thus would grow by 1,540 to 5,346 over the period 2006 – 2016.

Although Sallins has dropped from being the ninth to the tenth largest settlement in the County, it has emerged from being the twelfth largest retail centre to the seventh, based on the update of the 2001 GDA floorspace survey. The town's total floorspace is 5,819m², comprising 2,477m² (42.6%) convenience floorspace, 2,742m² (47.1%) comparison and 600m² (10.3%) bulky goods. These figures exclude vacant floorspace. This is a very significant increase of nearly fivefold in total retail floorspace since 2001. The increase is attributable to the SuperValu anchored The Waterways and Sallins Town Centre schemes and the new Lidl.

The 2001 GDA Retail Strategy floorspace survey identified that Sallins had less than 1.0% (9m²) of its net floorspace vacant – an almost negligible quantum. The position is very different at 2009 but largely related to the two new schemes where take up has been greatly affected by the slowdown in the economy. In The Waterways, at the time of the 2009 health check, there were some seventeen ground floor commercial/retail units vacant. Not all of these would be anticipated to have retail uses but the vacancy rate reflects a combination of the timescale involved in letting retail/non retail services units and the general downturn in the market. The anchor SuperValu was busy and the car park full, indicating it had become an attractive alternative for local people rather than the journey and congestion of travelling to the poor main food stores in Naas or the better offer in Newbridge. This noted, it is recognised that the car park may also be an alternative location for rail traveller commuter parking and mask the vitality of the retail floorspace. While this may be part of the equation, the anchor store was busy at the time of the health check and on subsequent visits to Sallins by the Consultants. Since the initial health check was undertaken as part of the preparation of the Retail Strategy, Lidl has opened in the town but its effects have not yet resulted in the take up in the nearby Sallins Town Centre scheme where there are nine vacant/unlet units. In addition to the two new schemes and Lidl, existing retail, non retail services and commercial leisure floorspace in Sallins Town Centre include a service station, pharmacy, launderette, convenience stores, crèche, restaurants, and three public houses.

6.5.2 Core Retail Area

At the time of the preparation of the 2005 Strategy, it was assessed that Sallins' retail floorspace was limited and widely distributed around the town centre and, as such, it did not have what could be defined as a Core Retail Area. This is the position that remains in place at the time the Retail Strategy was being prepared.

6.5.3 Sequential Approach – Land Availability & Potential

As was recognised in the 2005 Strategy, Sallins remains highly dependent on Naas meeting the majority of its residents' shopping needs given that the town has effectively emerged as a satellite to the County Town/Level 2 Twin County Town Centre. This is unlikely to change substantially but there remains a need

to considerably enhance Sallins as a more self sustainable retail and non retail services centre in the County settlement and retail hierarchies. The Waterways and town centre schemes, in addition to Lidl, are vital in this equation but the focus on the consolidation and enhancement of the heart of this rapidly growing town requires to be reinforced as well as ensuring that the retail and non retail services needs of Sallins' existing and growing residential areas are better met in a more *efficient, equitable and sustainable* way. To this end, the retail strategy for the town requires to:

- i. Secure the mixed use retail-led redevelopment/regeneration of key town centre sites with the Odlum's depot, the former meat factory, GAA grounds and pitch and putt lands being sites of strategic potential and importance; and
- ii. Ensure that the retail needs of existing and new residential areas are met.

6.6 Prosperous

6.6.1 Heath Check

Prosperous is designated as a Hinterland Area Small Growth Town in the 2004 RPPGDA and 2005 County Development Plan settlement strategies and a Hinterland Area Tier 1 Level 4 Small Town Centre in the 2005 County Retail Hierarchy. It is not specifically designated at any level in the 2008 GDA Retail Hierarchy but its 2005 County Retail Hierarchy status remains important and in force. Prosperous is located within the '*Strategic Rural Assets*' area of the RPPGDA which stipulates that, within such areas, new development in a village must take account of and respect the established character of the village.

The town's development has been generally focused on its Main Street and is characterised by small clusters of retailing/services and extensive low density residential estates. These estates account for the significant growth in the town's population and have been driven by housing demand/pressures from the GDA Metropolitan Area. The 2007 Prosperous LAP identifies that the town centre comprises a mix of the *old* and *new* town centre with centrally located sites, which have not come forward, that would or could secure greater integration and town centre consolidation. Main Street is a major regional traffic route between the GDA and Midland Region. As a consequence, it suffers from heavy traffic congestion.

Since the 2002 Census, Prosperous has sustained its position as being the fourteenth largest settlement in the County. This noted, the town's population grew by a significant 138.2% from 814 to 1,939 over the period 1996 – 2006, accounting for 1.04% of the County's population at 2006.

Prosperous has witnessed a substantial increase in its retail floorspace since 2001, growing from a centre of 1,202m² to one of 5,105m² and elevating its position from the eleventh to the ninth largest retail centre in the County. This is largely as a result of the redevelopment and expansion of Finn McCarthy's Hardware Store but also other smaller scale improvements to the town's retail offer. The current breakdown in retail floorspace is 25.0% convenience and 75.0% comparison.

At the time of the 2001 GDA Retail Strategy floorspace survey, Prosperous had a vacancy level of under 4.0%, which was a low level and not one to raise concerns. The 2009 health check confirmed this to remain the position with only two vacant units in the town centre.

The town's convenience offer comprises symbol group stores (Mace and Londis) and independents. Comparison floorspace remains dominated by Finn McCarthy's hardware store which has substantially increased in size since 2001 and attracts customers from its extensive rural hinterland. The shops, as with non retail services floorspace, are dispersed around the town centre. As a result of new retail floorspace failing to keep pace with population growth, local people in Prosperous and its catchment area continue to travel to higher order centres to meet the majority of their main food and comparison shopping needs – a trend unchanged since the 2005 Strategy was prepared.

6.6.2 Core Retail Area

At the time of the preparation of the 2005 Strategy, it was assessed that Prosperous' retail floorspace was limited and widely distributed around the town centre and, as such, it did not have what could be defined as a Core Retail Area. This is the position that remains at the time the Retail Strategy was being prepared.

6.6.3 Sequential Approach – Land Availability & Potential

Although the substantial improvement/investment in the Finn McCarthy store is significant, given the downturn in the economy and its effects on the retail market, Prosperous' potential for considerably further improving its retail offer – particularly in respect of convenience floorspace is viewed as limited. This was the assessment in the 2005 Strategy – an assessment underpinned by significant buoyancy in the retail market. Noting this, a longer term view has to be taken – facilitating the enhancement of Prosperous' retail offer must remain a priority if local needs are to be better met within the town centre, specifically with regard to convenience shopping and there are a range of potential locations which could accommodate additional floorspace. The 2007 LAP, however, identifies that there are issues between the connectivity/synergy of the old and new Main Street and these require to be addressed. Additionally, as was set down in the 2005 Strategy, the needs of the town's expanding residential areas require to be met through a mix of neighbourhood facilities and corner shops.

6.7 Johnstown

6.7.1 Heath Check

Johnstown is designated as a Hinterland Area Commuter Village in the 2004 RPPGDA and 2005 County Development Plan settlement hierarchies and a Hinterland Area Tier 2 Level 4 Village Centre in the 2005 County Retail Hierarchy. It is not specifically designated at any level in the 2008 GDA Retail Hierarchy but its 2005 County Retail Hierarchy status remains important and in force.

It is a small settlement located close to Naas on the southern side of the M7, which bypasses the village. Until recently, as well as being an attractive satellite/dormitory village for Naas and commuters to the Metropolitan Area/Dublin conurbation, Johnstown was predominantly known for its attraction as a profile garden centre and conservatory centre shopping outlet destination. These have subsequently relocated to larger new premises to the north of the motorway, with the road being a major physical barrier between the village and what was a major attraction and employer.

Since the 2002 Census, Johnstown has emerged from being the sixteenth largest settlement in the County to eighteenth, when the additional main centres are taken into account. The village's population grew by a significant 458.4% from 161 to 899 over the period 1996 – 2006, accounting for 0.48% of the County's population at 2006.

Johnstown was not designated as a centre large or important enough in the GDA or County Retail Hierarchy to be included in the 2001 GDA Retail Strategy floorspace survey. As such, it was not included in the 2008 GDA Retail Strategy existing floorspace update. There is, therefore, no baseline floorspace information available for the village. The main shop is a symbol group Centra with the other retail floorspace dispersed around the Main Street. The relocation of the garden centre has had significant beneficial effects in respect of traffic congestion, which is positive, but the loss of the key attractor and the M7 barrier of its relocation site and the heart of the village is an issue.

6.7.2 Core Retail Area

At the time of the preparation of the 2005 Strategy, it was assessed that Johnstown retail floorspace was limited and distributed around the village centre and, as such, it did not have what could be defined as a Core Retail Area. This is the position that remains at the time the Retail Strategy was being prepared.

6.7.3 Sequential Approach – Land Availability & Potential

In a County context, accepting the village has witnessed a significant relative population increase, Johnstown is a small lower order centre in both the County settlement and retail hierarchies. The key issue is establishing and delivering a mixed use strategy/masterplan for the redevelopment/regeneration of the former garden centre/conservatory outlet. Without this critical mass then the potential for delivering development on infill sites is significantly undermined/eroded.

6.8 Kill

6.8.1 Heath Check

Kill is designated as a Hinterland Area Small Growth Town in the 2004 RPPGDA and 2005 County Development Plan settlement hierarchies and a Hinterland Area Tier 2 Level 4 Village Centre in the 2005 County Retail Hierarchy. It is not specifically designated at any level in the 2008 GDA Retail Hierarchy but its 2005 County Retail Hierarchy status remains important and in force.

The village was bypassed by the N7/M7 in the 1960s and over the last decade grew into a dormitory village in view of its proximity to Naas and the Dublin conurbation. The role is recognised in the 2002 *Kill Town Plan* which seeks to consolidate and develop Kill as a sustainable centre that retains its village atmosphere. Kill is a service centre for the equestrian industry, with a large number of stud farms, equestrian centres and Goffs Equine Sales Centre close by. It is an attractive and popular village that retains its built heritage and charm. There is much generated local traffic that results in congestion throughout the day, particularly in respect of the school run.

Since the 2002 Census, Kill dropped from being the twelfth largest settlement in the County to thirteenth. The village's population grew by 46.7% from 1,711 to 2,510 over the period 1996 – 2006, accounting for 1.35% of the County's population at 2006.

Kill has not witnessed any enhancement of its retail offer since the 2001 GDA Retail Strategy floorspace survey was undertaken. At seventeenth in the order of the main centres, it remains the smallest retail centre in the County for which there is baseline floorspace information from the 2001 Strategy. The village's total net floorspace has remained at 615m², comprising 504m² (82.0%) convenience floorspace and 111m² (18.0%) comparison. These figures exclude vacant floorspace.

At the time of the 2001 GDA Retail Strategy floorspace survey, Kill had no vacant floorspace and this remained the position at the time of the 2009 health check.

As was highlighted in the 2005 Strategy, for a village with its size of population Kill has an extremely limited retail offer. Although this can be largely attributed to Kill's proximity to Naas and the Dublin conurbation, it would have been anticipated that there would have been some growth in retail and non retail services floorspace over the period 2001 – 2009. The most recent development remains the 299m² Eurospar anchored Clarendon Court local centre. This comprises the symbol group convenience store, a hardware store, restaurant/cafe and other local level services. The village continues to be served by small scale convenience and comparison floorspace, with the former being the predominant. Convenience shopping includes a Mace and smaller independents dispersed around the village centre. As a consequence, local people in the village and its catchment area have to travel to Naas and higher order centres to meet the majority of their shopping needs.

6.8.2 Core Retail Area

At the time of the preparation of the 2005 Strategy, it was assessed that Kill's retail floorspace was limited and distributed around the village centre and, as such, it did not have what could be defined as a Core Retail Area. This is the position that remains at the time the Retail Strategy was being prepared.

6.8.3 Sequential Approach – Land Availability & Potential

It is an objective of the 2002 Town Plan, which is currently programmed for review by the Council, to consolidate and reinforce the heart of the village. Although there is scope for infill development, there is little potential for any substantial increase of retail floorspace within the village centre. This was the position at the time the 2005 Strategy was prepared. Now, as then, the village's expanding residential areas need to be looked at if the village is to witness any expansion of its retail offer and that ensure local needs are met in a more sustainable way.

6.9 Ballymore-Eustace

6.9.1 Heath Check

Ballymore-Eustace is designated as a Village and Hinterland Area Key Village in the 2004 RPPGDA and 2005 County Development Plan settlement hierarchies respectively and a Hinterland Area Tier 2 Level 4 Village Centre in the 2005 County Retail Hierarchy. It is not specifically designated at any level in the 2008 GDA Retail Hierarchy but its 2005 County Retail Hierarchy status remains important and in force.

As was assessed at 2005, the 2009 health check confirms that Ballymore-Eustace has a compact attractive village centre with wide, low rise streetscape and undulating topography that combine to yield a rural ambience. The majority of retail activity is located sporadically throughout the village along Main Street and Church Road. Other key uses include a mix of dwellings, public houses and restaurants. It appears to be a quiet village with little evidence of traffic congestion, even with the albeit limited residential growth that has taken place in the interim period.

Since the 2002 Census, Ballymore-Eustace dropped from being the sixteenth largest settlement in the County to twenty-first, when the additional main centres in the County Retail Strategy are included. Between 1996 – 2006, the village's population only grew by 0.9% from 719 to 725, accounting for under 0.4% of the County's population at 2006.

Ballymore-Eustace has not witnessed any enhancement of its retail offer since the 2001 GDA floorspace survey was undertaken. At sixteenth, it remains the second smallest retail centre in the County for which there is baseline floorspace information from the 2001 Strategy. The village's total net floorspace has remained at 626m², comprising 439m² (70.1%) convenience floorspace, 52m² (8.3%) comparison and 135m² (21.6%) bulky goods. These figures exclude vacant floorspace.

The 2005 Strategy identified that Ballymore-Eustace had no vacant floorspace. At the time of the 2009 health check, there were three vacant units which were spread around the centre. These serve, to a degree, to undermine the ambience of the village centre.

Ballymore-Eustace continues to have a very limited retail offer which serves day to day rather than main shopping needs. People, therefore, need to travel to meet the majority of their shopping needs in key centres such as Naas, Newbridge and the Dublin conurbation but also in recent years Blessington in neighbouring Wicklow has increasingly become an attractive alternative as a result of a substantial expansion of its shopping offer. In addition to the three main shops – the symbol group Centra, Cost Cutters and Mace, Ballymore-Eustace has a number of public houses with restaurants and the Gallery and Gifts speciality shop.

6.9.2 Core Retail Area

At the time of the preparation of the 2005 Strategy, it was assessed that Ballymore-Eustace's retail floorspace was limited and distributed around the village centre and, as such, it did not have what could be defined as a Core Retail Area. This is the position that remains at the time the Retail Strategy was being prepared.

6.9.3 Sequential Approach – Land Availability & Potential

As assessed in the 2005 County Retail Strategy, Ballymore-Eustace's limited shopping offer is generally meeting the daily shopping needs of the village and its surrounding area. Demand and potential will increase as the population grows. The priority should be to ensure that the village centre is consolidated and enhanced through infill development and the regeneration/re-use of vacant sites and buildings.

6.10 Athgarvan

6.10.1 Health Check

Athgarvan is designated as a Village and Hinterland Area Key Village in the 2004 RPPGDA and 2005 County Development Plan settlement hierarchies respectively. Although not specifically identified in either the 2005 County and 2008 GDA retail hierarchies, it would be designated as Level 4 Village Centre in both. It was not included in the 2005 Strategy health checks.

The village is located in central Kildare between the towns of Newbridge and Killcullen. It and its hinterland have strong connections with the bloodstock industry and are surrounded by several stud farms and training centres. It is an attractive low density village which benefits from its heritage and location on the River Liffey.

Population data on the village is derived from the 2007 Athgarvan LAP. This highlights that between 1994 – 2006 the village witnessed a significant 400% increase in population growing from 322 to more than 1,300 over the period. At 2006, Athgarvan accounted for 0.6% of the County's population and would rank as the sixteenth largest settlement in Kildare.

Athgarvan was not designated as a centre large or important enough in the GDA or County Retail Hierarchy to be included in the 2001 GDA Retail Strategy floorspace survey. As such, it was not included in the 2008 GDA Retail Strategy existing floorspace update. There is, therefore, no baseline floorspace information available for the village. Its retail and services offer comprises a convenience store, a florist and a public house. There is a new mixed use development in the village and two of the units remained vacant at the time of the 2009 health check. Given Athgarvan's limited retail and services offer, local people have to travel to meet the majority of their shopping and services needs, with Newbridge being the nearest key location.

6.10.2 Core Retail Area

As Athgarvan's retail floorspace is limited and dispersed around the village centre, it does not have what could be defined as a Core Retail Area.

6.10.3 Sequential Approach – Land Availability & Potential

Athgarvan's growing population is poorly served in respect of even daily shopping and services needs. The emphasis in the 2007 LAP is for consolidation of the village core and this should be the focus for new retail floorspace.

6.11 Derrinturn

6.11.1 Health Check

Derrinturn is designated as a Village and Hinterland Area Key Village in the 2004 RPPGDA and 2005 County Development Plan settlement hierarchies respectively. Although not specifically identified in either the 2005 County and 2008 GDA retail hierarchies, it would be designated as a Level 4 Village Centre in both. It was not included in the 2005 Strategy health checks.

It is a rural village, located in the north west of the County along the R403 between Allenwood to the south east, Carbury to the north west and Edenderry to the west. As a result of its location on the regional road, traffic can be heavy at different times of the day and traffic management measures have been implemented to manage the issue.

Since the 2002 Census, Derrinturn's population grew by a substantial 65.9% from 791 to 1,138, accounting for 0.6% of the County's population. The village is now the seventeenth largest settlement in Kildare. Based on revised RPPGDA population projections, it is assumed in the 2008 Derrinturn LAP that the village would continue to account for of the order of 0.4% of the County's population and thus would grow by 460 to 1,598 over the period 2006 – 2016.

Derrinturn was not designated as a centre large or important enough in the GDA or County Retail Hierarchy to be included in the 2001 GDA Retail Strategy floorspace survey. As such, it was not included in the 2008 GDA Retail Strategy existing floorspace update. There is, therefore, no baseline floorspace information available for the village. In comparison to many of the County's villages, Derrinturn has a range of shopping and other services including: a convenience store; pharmacy; phone shop; service station; laundrette; funeral home; crèche; and, two public houses. There was no vacant floorspace at the time the 2009 health check was undertaken. Although Derrinturn does have a range of services, local people in the village and its catchment area have to travel to meet the majority of their shopping needs, with Edenderry being the nearest higher order centre.

6.11.2 Core Retail Area

While Derrinturn has a range of shops and services, they are dispersed around the village centre and, as such, the village does not have what could be defined as a Core Retail Area.

6.11.3 Sequential Approach – Land Availability & Potential

For a settlement of its size and projected potential to grow, Derrinturn needs to see an enhancement of its retail and services offer. The emphasis should be on consolidating and reinforcing the village centre through infill development and the regeneration/re-use of vacant land.

6.12 Allenwood

6.12.1 Health Check

Allenwood is designated as a Village and Hinterland Area Key Village in the 2004 RPPGDA and 2005 County Development Plan settlement hierarchies respectively. Although not specifically identified in either the 2005 County and 2008 GDA retail hierarchies, it would be designated as Level 4 Village Centre in both. It was not included in the 2005 Strategy health checks.

The village expanded out from its crossroads on the R403 and R415 regional roads. This location and the industrial park located to the north west of the village generate substantial traffic in the village centre and traffic management measures have been implemented to address the issue.

Population data on Allenwood are derived from the 2008 Allenwood LAP. The Plan states that the population of the Plan Area was estimated to be 490 at 2006. On the basis of this, Allenwood would be defined as the twenty-second largest settlement in the County. Over the period of the LAP, it is projected that Allenwood's population will increase by 10% per annum, resulting in a projected population of 784 at 2013.

Allenwood was not designated as a centre large or important enough in the GDA or County Retail Hierarchy to be included in the 2001 GDA Retail Strategy floorspace survey. As such, it was not included in the 2008 GDA Retail Strategy existing floorspace update. There is, therefore, no baseline floorspace

information available for the village. It is a rural village with limited retailing facilities comprising a SuperValu in the new Esso petrol filling station mixed use development and a Londis with a Post Office. The 2009 health check identified that there were two vacant units in the new development, which is likely to reflect both the time it takes for take up of new floorspace to materialise and the slowdown in the economy. Given its limited retail offer then local people in the village and its catchment area have to travel to higher order centres to meet the majority of their shopping needs, with Newbridge and a greatly improved Edenderry being the closest options.

6.12.2 Core Retail Area

As Allenwood's retail floorspace is limited, it does not have what could be defined as a Core Retail Area.

6.12.3 Sequential Approach – Land Availability & Potential

Allenwood is an expanding centre and the needs of its growing population, as well as the estimated 1,392 (at 2002) people employed in the village, require to be enhanced if they are to be provided for in a more sustainable way. In accordance with the objectives of the LAP, the priority should be the consolidation and reinforcement of the village centre through infill development and regeneration/re-use of vacant land and buildings.

6.13 Kilteel

6.13.1 Health Check

Kilteel is designated as a Village and Hinterland Area Key Village in the 2004 RPPGDA and 2005 County Development Plan settlement hierarchies respectively. Although not specifically identified in either the 2005 County and 2008 GDA retail hierarchies, it would be designated as Level 4 Village Centre in both. It was not included in the 2005 Strategy health checks.

Between 2002 – 2006, Kilteel's population grew by 14.0% from 483 to 552 and would be ranked the twenty-third largest settlement in the County for which population data are available.

Kilteel was not designated as a centre large or important enough in the GDA or County Retail Hierarchy to be included in the 2001 GDA Retail Strategy floorspace survey. As such, it was not included in the 2008 GDA Retail Strategy existing floorspace update. There is, therefore, no baseline floorspace data available for the village. It is a rural village with one small convenience store and a public house. There was no vacant floorspace at the time of the 2009 health check. As a result of the village's very limited retail and services offer, local people in the village and its surrounding area have to travel to higher order centres to meet the majority of their shopping needs, with Naas and the Dublin conurbation being key locations although the improving convenience offer of nearby Rathcoole and the new CityWest Shopping Centre will also be alternatives.

6.13.2 Core Retail Area

As Kilteel's retail floorspace is limited, it does not have what could be defined as a Core Retail Area.

6.13.3 Sequential Approach – Land Availability & Potential

Kilteel's growing population is poorly served in respect of even daily shopping and services needs. However, given the size of the population, it is unlikely that the village would be able to sustain any substantial increase in its offer. The emphasis should be for consolidation of the village core and this should be the focus for any new retail floorspace.

7.0 RETAIL DEVELOPMENT POTENTIAL – SOUTH AREA

The towns and main centres in the South Sub-County Area are:

- i. Athy;
- ii. Kildare Town;
- iii. Monasterevin;
- iv. Castledermot;
- v. Rathangan; and;
- vi. Ballitore, Crookstown, Moone, and Timolin.

7.1 Athy

7.1.1 Heath Check

Athy is designated as a Hinterland Area Moderate Growth Town in the 2004 RPPGDA and the 2005 County Development Plan settlement hierarchies, a Level 2 Tier 3 centre in the national retail hierarchy, a Hinterland Area Tier 1 Level 3 Sub County Town Centre in the 2005 County Retail Hierarchy and a Level 3 Town Centre/Sub County Town Centre in the 2008 GDA Retail Hierarchy. In the national retail hierarchy, Athy is the same level as Naas and one below Newbridge and other competing centres such as Carlow and Portlaoise. The town is the designated Sub County Town Centre in the 2005 Strategy to serve the south of the County as reinforced in the following Council Specific Recommendation in the 2008 GDA Retail Strategy (Page 78) as follows:

‘To promote the role of Athy as key town serving the large rural hinterland of South Kildare seeking to create a critical mass within the urban core so that retail opportunities are developed to create a viable, attractive local destination for convenience and some comparison shopping and thus reduce market leakage from this area.’

The town has a pleasant urban environment with its historic narrow street structure and town squares divided by the River Barrow and the Grand Canal, which are both important features in the heart of the town. However, there are a number of old decaying buildings dotted along the main street which detract from the general appearance of the town centre.

Athy Town Centre suffers from serious traffic congestion due to its location at the intersection of the N78 (linking Kilkenny to Kilcullen and the M9 Motorway to Dublin), the R471 (linking Monasterevin to Carlow) and the R428 (connecting the town with Portlaoise.). This affects the quality of the retail environment along the main through route of the town. There are a number of strategic road improvements, including a new crossing of the River Barrow and the Grand Canal, proposed to redress the issue.

Since the 2002 Census, Athy has sustained its position as the sixth largest settlement in the County growing by 54.8% from 5,306 to 8,218 over the period 1996 – 2006, accounting for 4.4% of the County's population at 2006. The 2006 Athy Town Development Plan provides the residential zonings for this growth to continue and enables the population of the town to grow by between 8,900 – 15,900.

Although the sixth largest settlement, at the time of the 2001 GDA Retail Strategy floorspace survey Athy was the third largest retail centre in the County. In the interim period, at 2009, the town has dropped to fifth place below Maynooth and Kildare Town respectively. The town's total floorspace is 8,728m² net, comprising 4,391m² (50.3%) convenience and 4,337m² (49.7%) comparison.

These figures exclude vacant floorspace. This is an increase of just under 17.3% of total floorspace since 2001 and is wholly attributable to the introduction of Lidl to the town's offer which has modified the balance between convenience and comparison floorspace. From being predominantly a comparison shopping location, convenience floorspace has become the largest sector. It is also noted that, as was the position at the time the 2005 Strategy was prepared, bulky goods floorspace does not form part of the town's retail profile although there are units of varying quality in the industrial estates/parks. These were not included in the 2001 floorspace survey, in view of the methodology adopted and agreed. They would increase the town's total net floorspace but, as a floorspace survey was not part of the preparation of the new County Retail Strategy, there is no information on the quantum of the floorspace.

The 2001 floorspace survey identified that Athy had a vacancy rate of 7.7% or 626m², which was not of a level to cause concern. This position has significantly changed in the interim period, with this being highlighted in the 2008 Athy Town Retail Strategy, which was commissioned in response to a commitment in the 2006 Athy Town Development Plan and to inform decision making on retail applications. The 2009 health check identifies that the vacancy issue has continued to increase with vacancies doubling from thirteen to twenty six since the 2006 baseline for the 2008 Town Retail Strategy was prepared. The quantum and profile of the vacancies seriously undermine the ambience and attraction of the town centre.

Unlike other key centres in the County Retail Hierarchy, Athy has had a detailed Town Retail Strategy prepared. As such, there is a substantial baseline of information and analysis on the town and its potential. This should be the reference document for detailed information on the town, reflecting that the new County Retail Strategy is focused on the strategic County level and, therefore, only key analysis from the former is incorporated and appropriate.

There are a large number of convenience shops within the town centre, the largest of which is the Pettitts' SuperValu located at Edmund Rice Square. It provides a good range of convenience goods. In addition to Pettitts, there is a second SuperValu on Duke Street and two Perry's supermarkets located on Leinster Street and Duke Street. A number of small butcher, grocery and newsagent shops are interspersed around the town centre. Two specialist convenience shops – the Healthy Living Health Store and Afro-Caribbean Foodstore – are located on Leinster Street. A Farmers Market and Craft Fair also take place every Sunday morning in Emily Square providing a wide range of fresh produce and gourmet foodstuffs.

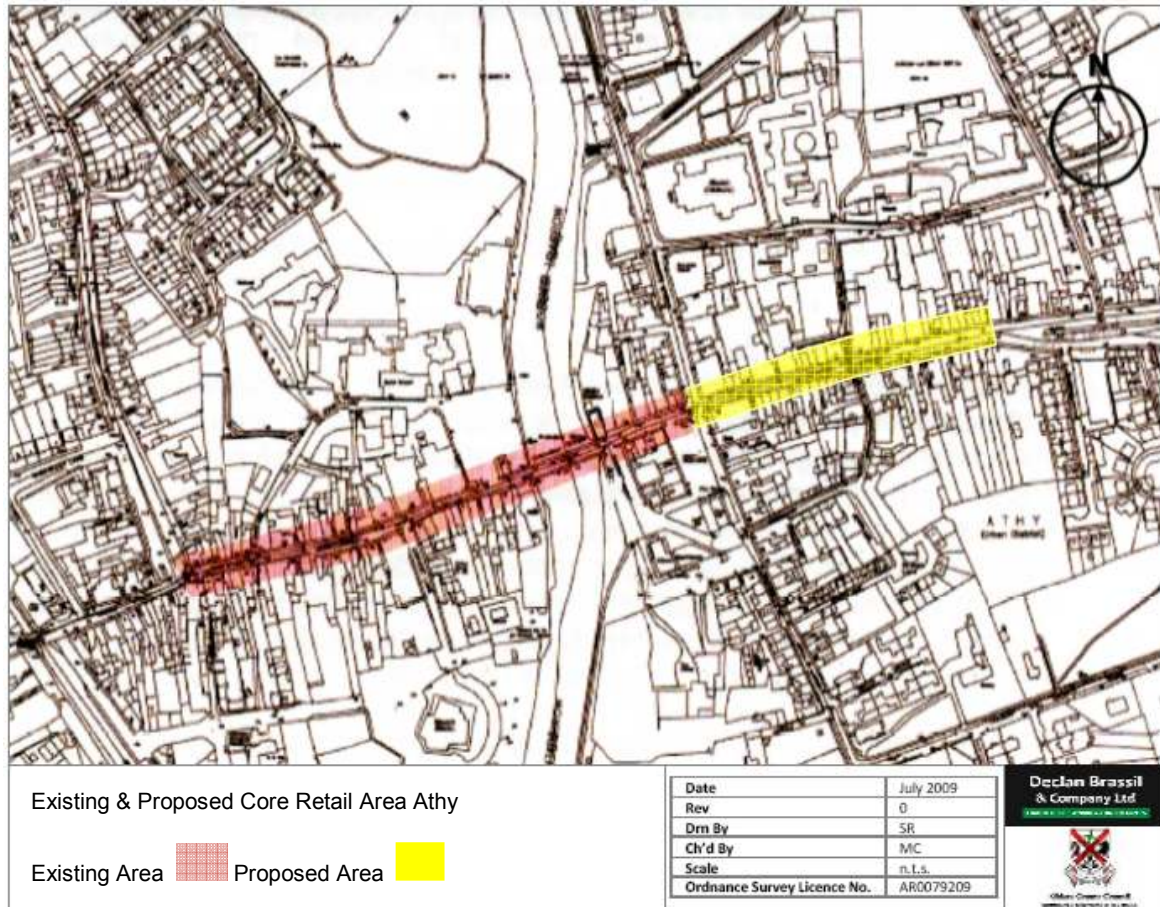
Household and shopper surveys commissioned as part of the preparation of the 2006 Town Development Plan identified that some 69.0% of comparison expenditure potential leaks from the town and its catchment area. Athy's comparison shopping continues to be characterised by being anchored by the Shaws' department store on Duke Street with the remainder of the offer provided by a number of small independent retailers offering a relatively lower order range of clothing, footwear and household items. This is in stark contrast with the major investment that has taken place in key competing centres but also in Kildare Town which has become a new – and close – competing comparison spend attraction with the opening of the KVOC. Additionally, on the whole there are emerging proposals for the attraction of the competing centres to be further enhanced.

Although there is potential for Athy to become one of the most important retail centres in the County, apart from the new Lidl, there has been no substantial additional retail floorspace since 2001. However, this masks the considerable market interest in major new schemes within and around the town at the time that the Town Retail Strategy was being prepared, of which a number now have full planning permission. Those with permission include: the expansion and remodelling of the Shaw's department store on Duke Street; the Geraldine Partnerships' grant for the convenience anchored regeneration of the former Esta factory site on Kildare Road; the mixed retail permission for the Woodstock South Site which incorporates a neighbourhood centre and a retail park; and, the more recently granted mixed use but predominantly retail Raggett scheme which is located off Leinster Street. The implementation of granted and emerging schemes would significantly enhance and reinstate Athy's role and potential in the shopping patterns of the south of the County, particularly in respect of leakage to the nearby higher order centres of Carlow and Portlaoise.

7.1.1 Core Retail Area

A key finding of the 2008 Town Retail Strategy health check was that there had been a shift of the Core Retail Area eastwards since the health check was undertaken in 2003 as part of the preparation of the 2005 Strategy. Figure 7.1 illustrates that the designated Core Retail Area extends along Leinster Street to the east and Duke Street to the west within the town centre. The remainder of what comprises the town centre includes Stanhope Street, Emily Square, Edmund Rice Square and Convent Lane.

Figure 7.1 Athy Current Core Retail Area & Proposed Extension



7.1.2 Sequential Approach – Land Availability & Potential

The 2008 Athy Town Retail Strategy was based on an in depth analysis of a number of town centre, edge of centre and out of centre sites. It concluded:

'Finally, while there are a number of lands and buildings within and around Athy Town Centre and the town as a whole which individually and collectively have the potential to enhance the retail offer and attraction of the town, the catalyst to these being realised is set by a critical mass of floorspace being delivered in the town centre. While all of these have been reviewed in the study, although they are not discounted, the focus of the study has been on land and buildings which have the critical mass to provide the catalyst for significant regeneration of the town centre and deliver the quantum of floorspace required for the retail objectives of the Development Plan and Retail Strategy to be realised.'

Based on the above, the following seven sites were assessed as having strategic potential to contribute to the objectives of the 2006 Town Development Plan being met. The detail of the sites and their potential is

provided in the Town Retail Strategy. The sites are:

- **Site 1:** Land off Leinster Street
- **Site 2:** Land adjacent to Pettitts' Supermarket
- **Site 3:** Land off Stanhope Place
- **Site 4:** The Abbey Site
- **Site 5:** Land opposite Mansfield Grove, Dublin Road
- **Site 6:** Former Esta Factory
- **Site 7:** Land off Ballylynan Road.

In addition to the main retail offer of the town, the needs of existing and growing residential areas will also require to be met through a network of retail centres.

7.2 Kildare Town

7.2.1 Health Check

Kildare Town is designated: as a Hinterland Area Moderate Growth Town and, with Monasterevin, as the County's only Secondary Dynamic Cluster in the 2004 RPPGDA and the 2005 County Development Plan settlement hierarchies; a Hinterland Area Tier 1 Level 3 Sub County Town Centre in the 2005 County Retail Hierarchy; and, a Level 3 Town Centre/Sub County Town Centre in the 2008 GDA Retail Hierarchy.

The heritage of the town permeates its streetscape but until the opening of the M7 extension/bypass of the town, congestion eroded Kildare Town's attraction as a place to stop and visit. Surrounding attractions, including the Japanese Gardens and the National Stud, however, draw in large numbers of visitors to the area. The ambience of the town centre has been improved with the opening of the extension/bypass and investment in the Market Square but it is still not attaining the potential it could realise.

Since the 2002 Census, Kildare Town has sustained its position as the seventh largest settlement in the County growing by a substantial 72.6% from 4,278 to 7,538 over the period 1996 – 2006, accounting for 4.0% of the County's population at 2006.

Although Kildare Town remained the seventh largest settlement in the County, since 2001 it has emerged from being the seventh to the fourth largest retail centre in Kildare, overtaking Athy, Celbridge and Leixlip. The town has a total floorspace of 14,034m² net, comprising 2,610m² (18.6%) of convenience, 10,314m² (73.5%) comparison and 1,110m² (7.9%) bulky goods floorspace. These figures exclude vacant floorspace. This is very significant increase of 327.3% in total retail floorspace since the 2001 baseline was established. The increase is predominantly attributable to the substantial increase in comparison floorspace which is as a result of the important introduction of the KVOC to the town and County's retail offer and attraction.

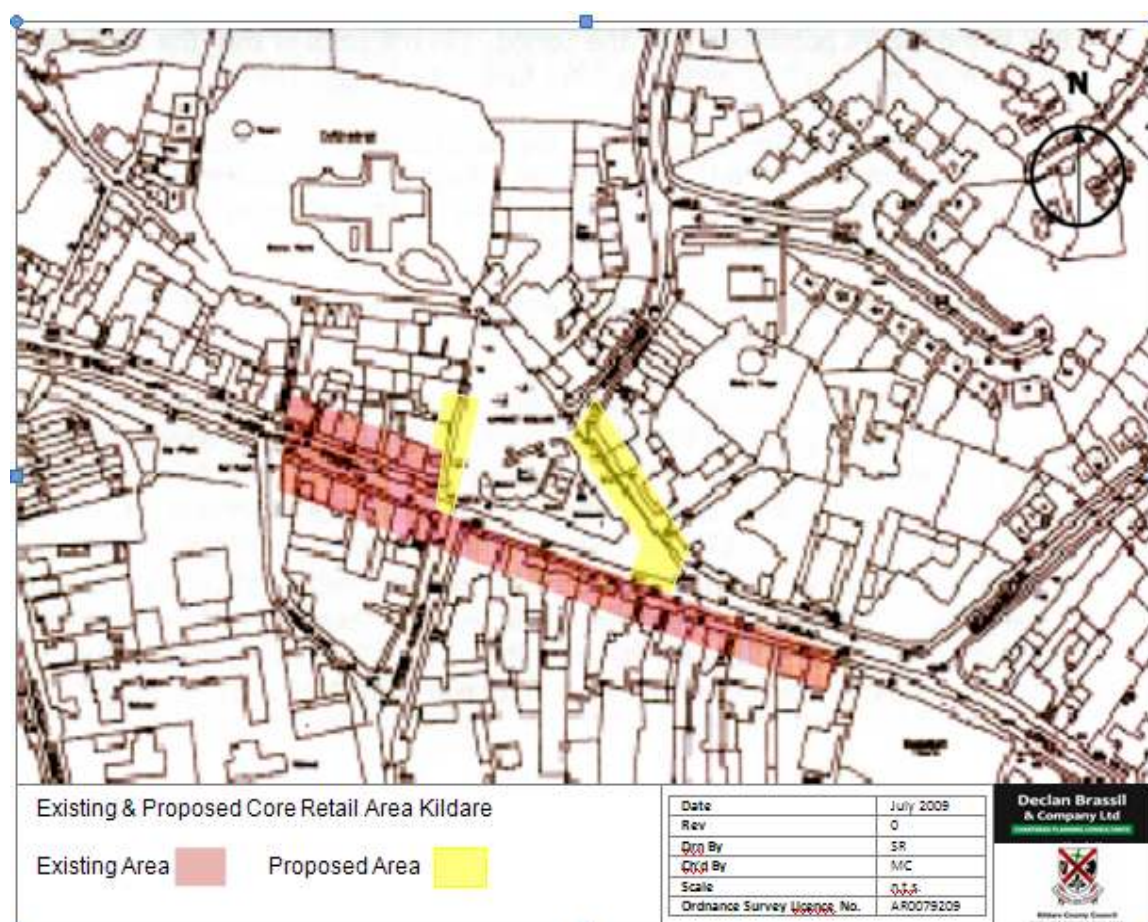
The 2005 Strategy identified that vacant retail floorspace in the town was nearly 3.8%, a level well below that which should cause concern. The position has, however, considerably changed in the interim period with some twelve premises identified as vacant at the time of the 2009 health check. These are located on Bridge Street (3), Station Road (2) and seven of the fifteen in the mixed use SuperValu anchored Claregate Street scheme. These, in addition to the closure of other commercial premises in the town centre – particularly public houses, have resulted in the dynamics and ambience of the town centre being severely eroded.

For a town of its size and catchment area, Kildare Town is limited in its convenience floorspace. In addition to a number of independents, the main stores are the SuperValu in the Claregate Street scheme and the Lidl on the Dublin Road. There continues to be strong market interest for the position to be redressed. The improvement in the town's quality and quantum of comparison floorspace is almost wholly attributable to the KVOC on the Nurney Road. It is a designer outlet centre of national and regional importance rather than a mainstream comparison shopping offer. In respect of the town's bulky goods floorspace, this is not of a modern format. Although Kildare Town is now the fourth largest retail centre in the County, local people in the town and its catchment have to travel to higher order centres for the majority of their main food, mainstream comparison and bulky goods shopping needs which is not the position sought for a Sub County Town Centre in the County's shopping patterns.

7.2.2 Core Retail Area

Since the 2005 Strategy was prepared, Kildare Town's Core Retail Area has expanded through the introduction of a greater number of retail businesses around Market Square. This is illustrated in Figure 7.2. The Core Retail Area now comprises Dublin Street west of Beechgrove along Claregate Street to the junction with Bangup Lane and Market Square.

Figure 7.2 Kildare Town Current Core Retail Area & Proposed Extension



7.2.3 Sequential Approach – Land Availability & Potential

The 2005 Strategy highlighted that there were no opportunities within and around the Core Retail Area of the town centre that could accommodate the larger format convenience floorspace that was needed in the town for it to become a more self sufficient Sub County Town Centre. This equally applies to comparison

floorspace. To redress this and enable the expansion of Kildare Town Centre, the 2002 Kildare LAP, which is programmed for review, identified lands to the south west of the town centre (AAP3) as the priority area for retail led mixed use expansion of the town centre. Any scheme requires to have a strong anchor if the vitality and viability of Kildare Town Centre is to be achieved and maximised.

It is understood that there are emerging proposals for an expansion of the KVOC. These will enable the centre to enhance its critical mass and stem the flow of expenditure in this niche sector to the currently larger two Factory Outlet Centres (FOC) in Northern Ireland at Banbridge in County Down and Junction 1 in Antrim. Any expansion will require to be restricted to the selling of designer brand seconds or surplus stock and, as with all large retail developments, will have to meet the tests of the RPG, 2008 GDA Retail Strategy and new County Retail Strategy assessment criteria, particularly in respect of retail and cumulative impact. Additionally, although the KVOC has raised the profile and attraction of Kildare Town and the County, its benefits have not been harnessed to their maximum. In respect of Kildare Town, there requires to be significantly enhanced linkage and synergy with the town centre and addressing this will be a requirement of any grant of permission. Looking at the County as a whole, particularly Naas and Newbridge, the objective will be to encourage linked shopping trips to the KVOC and the Twin County Town Centres.

It is recognised that currently designated lands in the town centre will not have the capacity to meet all of Kildare Town's main food and mainstream comparison shopping needs. As has been upheld in a suite of planning decisions, the retail strategy for the town is to secure town centre consolidation through expansion of the retail offer on town centre and edge of centre sites. In addition to a number of infill and backland area sites, the following three key opportunities are identified:

- i. The designated AAP3 lands to the west of the designated Core Retail Area which provide the development potential for a critical mass of retail floorspace as well as a mix of other town centre land uses;
- ii. Lands to the north of the KVOC – these will play an important role in facilitating linkage between the KVOC and the heart of the town centre; and
- iii. Magee Barracks – the 2005 Magee Barracks LAP identified that a neighbourhood centre was one of the range of uses suitable for the site. A further review of the potential of the site has been underway and there is support for it making a greater contribution to consolidating and enhancing the town's retail offer.

The above three sites will enable an east – west sequential expansion of the town centre. There is also additional potential for consolidation/expansion of the traditional heart of Kildare Town Centre through infill development and the redevelopment/regeneration of derelict/under-utilised sites and buildings in and around the Core Retail Area. All of these lands have a *Town Centre* zoning in the current LAP. To ensure that the three key sites contribute to this then the review of the Kildare Town LAP requires to provide the appropriate zonings and objectives.

In addition to the main retail offer of the town, the needs of existing and growing residential areas will also require to be met through a network of local and neighbourhood centres. As the priority location for large format convenience floorspace is existing designated sites and the above two sites, until this has been achieved then larger format centres in the town's suburbs will not be permitted.

Given the saturation of the retail warehousing market and the proximity of the offers in both Naas and Newbridge then it is not anticipated in the foreseeable future that there will be any substantial enhancement of Kildare Town's bulky goods floorspace. This position, however, requires to be monitored.

There is scope to improve the town's attraction as a destination through: additional investment in the public realm; attracting a critical mass of new retail investment within and adjacent to the heart of the traditional town centre; and, by the enhancement of supporting tourism infrastructure (hotels, restaurants, bars and

car parking).

7.3 Monasterevin

7.3.1 Health Check

Monasterevin is designated: as a Hinterland Area Moderate Growth Town and, with Kildare Town, as the County's only Secondary Dynamic Cluster in the 2004 RPPGDA and 2005 County Development Plan settlement hierarchies; a Hinterland Area Tier 2 Level 3 Town Centre in the 2005 County Retail Hierarchy; and, a Level 3 Town Centre/Sub County Town Centre in the 2008 GDA Retail Hierarchy.

The town's street pattern reflects its historical development and the natural constraints imposed by the River Barrow and Grand Canal to the west, the railway line to the north and the N7 and Moore Abbey to the south. Consequently, most development in recent years has been to the east of the town. Until the opening of the Monasterevin M7 Motorway and bypass, the town centre was one of the most congested in the country. This generally eroded the potential for development in the town centre, which has remained limited in the interim period.

Since the 2002 Census, Monasterevin has sustained its position as the eleventh largest settlement in the County growing by 31.0% from 2,302 to 3,017 over the period 1996 – 2006, accounting for 2.0% of the County's population at 2006. The 2008 Monasterevin LAP provides population forecasts to 2016. These are based on revised RPPGDA population projections where it is assumed that Monasterevin would continue to account for 2.0% of the County's population and thus would grow by 1,540 to 4,557 over the period 2006 – 2016.

Although Monasterevin has remained the eleventh largest settlement in the County, over the period since the 2001 GDA floorspace survey was conducted the town has dropped from being the eighth to the tenth largest retail centre in Kildare. At 2009, it was estimated that the town had a total net retail floorspace of 3,618m², comprising 1,956m² (54.1%) of convenience and 1,662m² (45.9%) of comparison floorspace. These figures exclude vacant floorspace. This is a substantial increase of 104.4% in total retail floorspace since the 2001 baseline was established. The increase is wholly attributable to the considerable increase in convenience floorspace, which directly relates to the new SuperValu located to the north east of the town centre.

The 2005 Strategy identified that vacant retail floorspace in the town was just over 6.9%. This was largely in ground floor shop units below warehouse conversions along Dublin Street. It indicated that these, combined with a number of derelict/poorly maintained former warehouses on the street, brought an image of decline and the lack of take up was largely due to heavy traffic congestion. It was anticipated that this would be redressed with the removal of the heavy traffic following the opening of the M7 bypass. This has not happened and these vacancies remain, totalling nine at the time of the 2009 health check. Four of these are on the ground floor of the converted Mill scheme on Dublin Street and three out of the five in the new town centre scheme on the R445 (former N7) and River Barrow. In respect of the latter, this can be attributed to the time lapse between opening and take up of space but the current retail/commercial market and lack of an anchor will have exacerbated the issue.

At the time of the 2005 Strategy, Monasterevin's retail profile was characterised as being predominantly convenience comprising the new SuperValu anchored shopping centre with five ancillary units, a mix of independent retail and services providers and the Willoughby's hardware store. Willoughby's was recognised as a considerable draw within the town and its catchment area and with the store dominating the central area of the town. Since then, the position has largely remained the same with the exception of the new town centre scheme, highlighted above as being largely vacant. Monasterevin continues to have a limited retail offer for a town of its size and catchment area and in respect of its role and importance in the GDA and County settlement and retail hierarchies, in particular in its role as part of the RPPGDA designated Kildare Town – Monasterevin Secondary Dynamic Cluster.

7.3.2 Core Retail Area

At the time of the preparation of the 2005 Strategy, it was assessed that Monasterevin's retail offer was limited and widely distributed around the town centre and remainder of the town. As such, it did not have what could be defined as a Core Retail Area. Although there has been the new town centre development and additional *Town Centre* zonings in the 2008 LAP, this is the position that still remains at the time the Retail Strategy was being prepared.

7.3.3 Sequential Approach – Land Availability & Potential

The 2005 Strategy stated that Monasterevin did not have the scope and potential to meet the needs of its expanding population, particularly in respect of convenience floorspace. This issue has been addressed to an extent through the *Town Centre* zonings in the 2008 LAP with the following key designations:

- The extension of the town centre into the Moore Abbey Demesne
- An extension of lands already zoned '*Town Centre*' to the west of Monasterevin between the R445 and the River Barrow
- The 0.43ha site at the junction between Whelan's Row and Drogheda Street being reaffirmed, through a modification to the Plan, as suitable for town centre uses
- The 0.12ha site to the east of West End Street being reaffirmed, through a modification to the Plan, as suitable for town centre uses.

These zonings respond to one of the key objectives in the 2008 LAP, which is to consolidate and strengthen the town centre to ensure not only that it better meets local needs but also that it provides the means for its more substantive integration into the Kildare Town/Monasterevin Secondary Dynamic Cluster, the strategic framework for this being provided by the IFPLUTS covering the area. The size of the sites and their local townscape and heritage contexts are envisaged to limit their potential for any major new town centre development, particularly in the context of the fact that the viability and success of such developments requires to have an anchor. Within Monasterevin, given the town centre's unique heritage and streetscape then a large format foodstore anchor would be unlikely to be appropriate on any of these sites and thus comparison anchors require to be looked at. Although the town and its wider catchment area are underprovided for in respect of comparison shopping, it is unlikely to attract the anchors required given the lack of lands available to deliver the critical mass to attract other occupiers. The potential is, therefore, promoting and establishing the town centre as a niche speciality shopping and tourist destination that builds on the asset of its heritage, townscape and waterways as well as the town's profile associations with Gerald Manley Hopkins and the famous Irish Tenor Count John McCormack. This is recognised as not a strategy that will redress the shopping deficiencies in the Monasterevin but seeks to build on the strengths and constraints of the historic core and enhance the vitality and viability of the town centre.

As a consequence, while the focus rightly is on the consolidation of the town centre through the regeneration of underused or vacant buildings and sites, unlike many other centres, if Monasterevin is to substantially increase the quality and quantum of its retail offer out of centre locations require to be looked at, specifically a network of local and/or neighbourhood centres in existing and growing residential areas.

7.4 Castledermot

7.4.1 Health Check

Castledermot is designated as a Village and Hinterland Area Key Village in the 2004 RPPGDA and 2005 County Development Plan settlement hierarchies respectively and a Hinterland Area Tier 1 Level 4 Small

Town Centre in the 2005 County Retail Hierarchy. It is not specifically designated at any level in the 2008 GDA Retail Hierarchy but its 2005 County Retail Hierarchy status remains important and in force.

The town has retained its medieval street pattern and today comprises a compact linear small town centre around which new residential estates have grown driven by demand from the Dublin conurbation, Naas, Newbridge and Carlow. Currently sitting on the N9 between Dublin and Waterford, which also converges with the N10 to Kilkenny, Castledermot has a congested town centre dominated by cars and HGVs. These issues will be addressed with the extension of the M9, scheduled for completion in 2010. The congestion, combined with a lack of new investment, the competition from stronger and higher order towns and the more recent slowdown in the economy, has resulted in Castledermot being a centre that has significantly declined in its retail and services offer as well as its environment, ambience and profile since the 2005 Strategy was prepared.

Since the 2002 Census, Castledermot has declined from being the seventeenth largest settlement to the nineteenth in the County, following the inclusion of other main centres in the County Retail Strategy. It grew by 21.0% from 733 to 887 over the period 1996 – 2006, accounting for just under 0.5% of the County's population at 2006.

In addition to Castledermot dropping in position in respect of its size within the County settlement hierarchy, over the period since the 2001 GDA floorspace survey was conducted the town has also declined in importance with respect to its status in the league of quantum of retail floorspace. It is now the fourteenth rather than the tenth largest retail centre in Kildare, reflecting the fact that there has been no improvement in Castledermot's retail offer since 2001. The town's total floorspace remains at 1,209m² net, comprising 1,174m² (97.1%) convenience floorspace and 35m² (2.9%) comparison. These figures exclude vacant floorspace. The lack of additional floorspace reflects the impact of the current congestion and the decline of the town in shopping patterns.

The 2005 Strategy identified that vacant retail floorspace in the town was 10.8% of total floorspace, which was a very high level for a centre of its size. This level has increased in the interim period with the 2009 health check identifying six vacancies, all located on Main Street. In addition to retail vacancies, there is a large amount of vacant commercial and commercial leisure floorspace, the most notable being the Shamrock Public House which is a key building at the heart of the village centre. These factors and trends all combine to indicate that this is a centre that has witnessed considerable decline in its vitality and viability over the last ten years.

As was anticipated in the 2005 Strategy, Castledermot did not witness any increase in its retail floorspace over the period of the Strategy. Its offer comprises a symbol group Londis, an independent grocers, two butchers, a pharmacy, an interior designer, a florists, three hairdressers, restaurants, a hot food take away and public houses, all catering for a very local market and generally daily needs. People in the town and its surrounding area have to travel to higher order centres to meet the majority of their shopping needs, with Carlow (10km distant) being the closest and most readily accessible centre. The significant improvement in Carlow's offer in recent years is a major draw from Castledermot and the south of the County as a whole.

7.4.2 Core Retail Area

At the time of the preparation of the 2005 Strategy, it was assessed that Castledermot's retail floorspace was limited and distributed around the town centre and, as such, it did not have what could be defined as a Core Retail Area. This is the position that still remains at the time the Retail Strategy was being prepared.

7.4.3 Sequential Approach – Land Availability & Potential

For Castledermot to better play its role in the shopping patterns of the County there requires to be a significant improvement in its retail and services offer. However, given the town's proximity and accessibility to both Carlow and Athy then it is unlikely to attract any of the national and international

convenience operators. The improvement is likely to be through symbol group convenience operators franchising to local businesses. The retail strategy for the town should be the expansion and consolidation of the town centre through the following options for new development:

- i. The substantial tracts of land behind both the east and west of Main Street; and
- ii. The re-use and regeneration of vacant lands and buildings along Main Street, particularly former agricultural and other industrial buildings and the Shamrock Public House.

Pressure should be resisted for any out of centre retail development as this would further undermine what is a weak and underperforming town centre. There is a need to address the town centre environment through streetscape enhancement and the opportunity for this to be effective will come with the completion of the M9 bypass of the town.

7.5 Rathangan

7.5.1 Heath Check

Rathangan is designated as a Hinterland Area Small Growth Town in the 2004 RPPGDA and 2005 County Development Plan settlement hierarchies and a Hinterland Area Tier 1 Level 4 Small Town Centre in the 2005 County Retail Hierarchy. It is not specifically designated at any level in the 2008 GDA Retail Hierarchy but its 2005 County Retail Hierarchy status remains important and in force.

It is an attractive town located on the Slate River and the Grand Canal with this location having brought prosperity to the town. Rathangan is a busy town centre that will benefit from the proposed new river crossing which will help reduce traffic flows through the centre and encourage the expansion of the town to the south of the canal. The timescale for the implementation of this is, however, uncertain.

Since the 2002 Census, Rathangan has dropped from being the thirteenth largest settlement in the County to fifteenth. Overall it grew by 44.3% from 1,190 to 1,718 over the period 1996 – 2006, accounting for just over 0.9% of the County's population at 2006.

In addition to being the fifteenth largest settlement in the County, over the period since the 2001 GDA floorspace survey was conducted the town has remained the fifteenth largest retail centre in Kildare. Between 2001 – 2009, Rathangan's total retail floorspace increased by nearly 40.0% from 752m² to 1,052m², comprising 57.0% convenience and 43.0% comparison floorspace.

The 2005 Strategy identified that vacant retail floorspace in the town was 11.1% of total floorspace, which was a very high level for a centre of its size. The position has increased in the interim period with some five premises identified as vacant at the time of the 2009 health check. Although these are spread around the town centre, they detract from the ambience of what is otherwise a busy centre.

Rathangan still continues to have a very limited retail offer for the size of the town and its surrounding area's population. The main store is a symbol group Centra with the remainder of the convenience shopping being small independent businesses. Although Rathangan's comparison offer is small in quantum, there is a range of independent hardware, furniture and comparison goods shops which indicate it retains an important role in its rural catchment area. As at the time of the 2005 Strategy, given the limited retail offer then local people must travel to meet the majority of their shopping needs. This requires to be redressed, particularly in respect of convenience shopping. Positively, while there has been no new floorspace since the 2001 baseline survey, submissions to the Draft County Development Plan indicate that there is market interest in retail development in the town.

7.5.2 Core Retail Area

At the time of the preparation of the 2005 Strategy, it was assessed that Rathangan's retail floorspace was limited and distributed around the town centre and, as such, it did not have what could be defined as a Core Retail Area. This is the position that still remains at the time the Retail Strategy was being prepared.

7.5.3 Sequential Approach – Land Availability & Potential

The 2005 Strategy highlighted the substantial scope for Rathangan to develop and expand through the regeneration/redevelopment of former mill buildings and associated lands which were known to be available for development. This remains the position at the time the Retail Strategy was being prepared. It is recognised that redevelopment of such properties can be complex but it is essential that they are the priority for new retail and other town centre development if Rathangan Town Centre is to both consolidate and expand. Any out of centre development would undermine this potential being achieved and should be resisted under the tests of the Sequential Approach.

Additionally, the 2005 Strategy identified the considerable tourism potential of the town, which was recognised in the 2002 LAP. This provides scope for retail expansion and should be encouraged.

7.6 Ballitore/Crookstown/Moone/Timolin

Ballitore, Crookstown, Moone and Timolin are a group of neighbouring villages in South Kildare, located along the old N9 Dublin/Waterford route. They are now generally bypassed by the existing N9 but this will be further reinforced with the 2010 programmed completion of the Kilcullen – Carlow stretch of the new M9. Reflecting the proximity of the four villages, to ensure the orderly development of each, their planning has been guided by a single LAP, the *2002 Ballitore, Crookstown, Moone and Timolin Local Area Plan*.

All of the settlements are designated as Hinterland Area Villages and Key Villages in the 2004 RPPGDA and 2005 County Development Plan settlement hierarchies. They were not specifically identified in either the 2005 County or the 2008 GDA retail hierarchies but would be designated Level 4 Village Centres under both.

Although the four different centres can be defined, there has been ribbon development between each over a number of years. The objective of the 2002 LAP has been to prevent any further coalescence of these very different villages and communities.

7.6.1 Ballitore

7.6.1.1 Health Check

Ballitore is renowned as the first planned Quaker Village in either Ireland or England, which was established in 1685. The village has expanded with a mix of both public and private sector development. Although the general condition of buildings is good, there are a number of derelict and empty buildings which the 2002 LAP highlighted as priorities for sensitive re-use and regeneration given the unique heritage and townscape of the village.

The village's population grew by 8.9% from 716 to 780 between 2002 – 2006, accounting for just over 0.4% of Kildare's population at 2006. As such, Ballitore was not designated as a centre large or important enough in the GDA or County Retail Hierarchy to be included in the 2001 GDA Retail Strategy floorspace survey. As such, it was not included in the 2008 GDA Retail Strategy existing floorspace update. There is, therefore, no baseline floorspace information available for the village. Although there are a number of vacant and derelict properties in the village centre, none of these at the time of the 2009 health check would appear to have had a former retail use. Reflecting the size of the village, its retail and services offer is limited comprising one small convenience store, a Post Office, three public houses and a crèche. As

such, local people in the village and its surrounding area have to travel to higher order centres to meet their shopping needs with Carlow and Newbridge being the closest main centres.

7.6.1.2 Core Retail Area

As Ballitore's retail floorspace is limited and dispersed around the village centre, it does not have what could be defined as a Core Retail Area.

7.6.1.3 Sequential Approach – Land Availability & Potential

Ballitore has a larger population than Ballymore-Eustace and Straffan, both of which were included in the 2005 Strategy health checks. However, its retail and services offer is more limited than both of these. There is scope and potential for this to be improved to better meet local needs in a more sustainable way but any new retail floorspace is anticipated to be small scale. The priority is for any new floorspace to be accommodated within the village centre and contribute to the re-use and regeneration of land and buildings and consolidation of the heart of the village. In addition to enhancing the day to day shopping offer, Ballitore has the potential for tourism related retail development. Of key importance is that any proposals sensitively respect the unique heritage and streetscape of the village.

7.6.2 Crookstown

7.6.2.1 Health Check

The 2002 LAP states that Crookstown does not constitute a formal urban settlement but, is rather a loose grouping of mixed use buildings along the old N9. However, the Plan recognises the local service centre role the village plays for not only its own community but that of the nearby larger Ballitore, and to a lesser extent Moone and Timolin. This responds to the fact that Ballitore being a Quaker Village is without a church and that Crookstown benefits from having a community centre/theatre. The overall visual appearance of the commercial buildings in the village is poor and the 2002 LAP identified that they required upgrading.

The village has a population of only a few hundred people. As a consequence, Crookstown was not designated as a centre large or important enough in the GDA or County Retail Hierarchy to be included in the 2001 GDA Retail Strategy floorspace survey. Therefore, it was also not included in the 2008 GDA Retail Strategy existing floorspace update. There is, thus, no baseline floorspace information available for the village. Although there are a number of vacant and derelict properties in the village centre, none of these at the time of the 2009 health check would appear to have had a former retail use. It has a profile on the N9 through the Texaco service station and within the village there is a restaurant and hotel and a small industrial building complex, which includes a tyre depot, hardware store, saddlery and farm supply store. As such, local people in the village and its surrounding area have to travel to higher order centres to meet their shopping needs with Carlow and Newbridge being the closest main centres.

7.6.2.2 Core Retail Area

As Crookstown's retail floorspace is limited and dispersed around the village centre, it does not have what could be defined as a Core Retail Area.

7.6.2.3 Sequential Approach – Land Availability & Potential

Crookstown is unlikely to have the critical mass of population to attract new retail investment with daily needs generally being met in either the service station or in neighbouring Ballitore. Any proposals to redress this would be encouraged with the priority being the re-use and regeneration of lands and buildings within the central part of the village.

7.6.3 Moone

7.6.3.1 Health Check

As with the remainder of the 2002 LAP Plan Area, Moone's development has been evolved in periods of both religious and military history. Today, the village is characterised by a mix of detached historical houses and modern type bungalows but its centre is punctuated by a number of vacant and derelict structures.

The village's population grew by 15.3% from 372 to 429 between 2002 – 2006, accounting for just over 0.2% of the County's population at 2006. Its future population potential will be determined in the emerging County Development Plan and incorporated accordingly in the programmed review of the LAP.

Moone was not designated as a centre large or important enough in the GDA or County Retail Hierarchy to be included in the 2001 GDA Retail Strategy floorspace survey. As such, it was not included in the 2008 GDA Retail Strategy existing floorspace update. There is, therefore, no baseline floorspace information available for the village. Reflecting its population size, Moone has a very limited retail and services offer which includes a convenience shop, incorporating a Post Office, and a garage. As is typical of villages of this size and characteristics, local people have to travel to higher order centres to meet their shopping needs. This noted, although there are a number of vacant and derelict properties in the village centre, none of these at the time of the 2009 health check would appear to have had a former retail use.

7.6.3.2 Core Retail Area

As Moone's retail floorspace is limited and dispersed around the village centre, it does not have what could be defined as a Core Retail Area.

7.6.3.3 Sequential Approach – Land Availability & Potential

Moone is unlikely to have the critical mass of population to attract new retail investment with daily needs generally being met in Ballitore or the Crookstown Service Station. Any proposals to redress this would be encouraged with the priority being the re-use and regeneration of lands and buildings within the central part of the village. Moone's heritage importance also provides the scope for further development of its tourism profile and retail development would be anticipated to be an integral part of this.

7.6.4 Timolin

7.6.4.1 Health Check

Timolin's development was evolved in periods of both religious and military history. In addition, in more recent centuries, it has become recognised as an important centre for pewter and currently hosts the Irish Pewter Centre and visitor attraction in the former monastery. Apart from the introduction of a small local authority housing scheme, in general Timolin has not witnessed any new development and, therefore, generally retains its heritage and original streetscape. The village has on the whole grown within a limited structure along the former N9. Apart from a car sales outlet, a commercial depot and a petrol filling station, the village has no other retail floorspace, with Moone identified in the 2002 LAP as the location where day to day convenience needs are met. This position is anticipated to have changed with Carlow being the key alternative. It is recognised that the N9 bypass resulted in Timolin increasingly becoming a dormitory town for larger centres and this is the position that remains today given the balance provided by access to both rural and urban living.

Given the size of the village, there are no specific population data available. As such, it was not designated as a centre large or important enough in the GDA or County Retail Hierarchy to be included in the 2001 GDA Retail Strategy floorspace survey. Consequently, it was not included in the 2008 GDA Retail Strategy existing floorspace update. There is, therefore, no baseline floorspace information available for Timolin.

This noted, the 2009 health check identified that the village had no retail floorspace and, although there are a number of vacant and derelict properties in the village centre, none of these at the time of the health check would appear to have had a former retail use.

7.6.4.2 Core Retail Area

As the 2009 health check identified that the village has no retail floorspace then it does not have what could be defined as a Core Retail Area.

8.0 STRATEGIC FRAMEWORK FOR THE STRATEGY

Based on the detailed analysis of the performance and future potential of the main centres in the County, as summarised in Sections 5 – 7, the framework for the new County Retail Strategy is also based on a review of the following:

- i. How the 2005 Strategy achieved its aims and objectives at the strategic and settlement level; and
- ii. The strategic guidance for the future direction of the retail planning of the County, as set out in the 2008 GDA Retail Strategy.

Addressing both of the above is the focus of this section of the report.

8.1 2005 Kildare Draft County Retail Strategy – Progress & Performance Review

In looking forward to the shape and direction of the 2008 – 2016 County Retail Strategy, it is important that this is informed by a review of the progress achieved and any issues that have emerged in the delivery of the goals, objectives and specific policies and proposals set out in the 2005 Strategy. The review is structured by the framework of the 2005 Strategy.

8.1.1 Strategic Vision & Objectives

8.1.1.1 Goal

The strategic retail goal of the Council in the 2005 Strategy, which was adopted in the County Development Plan was:

‘To sustain and improve the retail profile and competitiveness of County Kildare within the economy of the Greater Dublin Area and beyond, through harnessing the assets and potential of centres at all levels of the County Retail Hierarchy.’

A review of performance against this goal can be summarised as follows:

- As confirmed in the 2008 GDA Retail Strategy and the 2009 County Retail Strategy shopper surveys, the County has greatly improved its retail profile and competitiveness with the key drivers of this being the Whitewater Shopping Centre in Newbridge and the Kildare Town KVOC, both of which have mass appeal beyond Kildare and the GDA’s boundaries in view of the quantum and quality of their retail offers and the profile of the retailers that have been attracted.
- There have been substantial improvements to the retail offer of Naas and Maynooth but both have more local catchments due to the nature and profile of retailers, accepting that Naas’ bulky goods offer is one of the best in the GDA.
- Progress in the delivery of Leixlip (including Collinstown) as the designated Metropolitan Area Level 2 Major Town Centre to serve North East Kildare has not yet been achieved. Although the statutory planning framework (2010 Collinstown LAP) to progress the new Major Town Centre is now in place, a window of opportunity could have been missed given the existing and emerging competition in Liffey Valley, Blanchardstown and Dunboyne, with the last centre also designated as a new Level 2 Major Town Centre in the 2008 GDA Retail Strategy.
- Although there has been significant market interest in Athy, there has been no major progress in the delivery of new retail floorspace to stem outflows from the south of the County.

8.1.1.2 Objectives

The 2005 Strategy set out nine retail planning objectives to provide the framework for the Strategy’s

strategic policy framework and also specific policies and proposals. These, and an overall assessment of progress, are outlined below.

8.1.1.2.1 Objective 1

'To address leakage of retail expenditure from the County by providing the means to strengthen the range and quality of its retail offer through securing the development of the appropriate quality and quantum of additional convenience, comparison and bulky goods retail floorspace in centres across the County'

As has been highlighted in Sections 2 and 3 of the County Retail Strategy, significant progress has been achieved in respect of delivering Objective 1 of the 2005 Strategy with the key headlines being:

- i. **Retail Floorspace:** the County has witnessed over a two and a half times increase in its retail floorspace between 2001 – 2009, increasing from 67,368m² net to 172,387m² over the period. Of particular importance is the fact that comparison floorspace, which is the key to competitiveness and redressing expenditure leakage, has grown in its share of total retail floorspace by almost 10.0% from 60.3% to 69.0% over the period; and
- ii. **Leakage and Inflows:** since 2001, leakage in convenience expenditure has declined from 8.0% to 2.2%, although inflows have modestly decreased from 9.0% to 5.7% with both reinforcing the fact that convenience shopping is done locally – as highlighted in the GDA Retail Strategy. The most significant progress has been made in the reduction of comparison expenditure leakage and the parallel enhancement in expenditure inflows. At 2001, some 47.0% of the County's residents' comparison expenditure was leaking predominantly to centres in the Dublin conurbation. This has reduced by 14.0% to 33.0% in the interim period. Comparison expenditure inflows have also substantially increased from 6.0% to 15.0%, even at a time when there have been major improvements in the quantum and quality of comparison floorspace in centres in the GDA and beyond. Expenditure retention can be attributed largely to the new Whitewater Shopping Centre, the Naas retail parks and the Manor Mills and Tesco anchored Town Centre Expansion Area in Maynooth. The large increase in comparison expenditure inflows are a direct result of the mass appeal and quality of offer of the Whitewater Shopping Centre and the KVOC.

There remains substantial scope and potential for comparison shopping market share and trade draw to be further enhanced through: the continued improvement and expansion of Newbridge's offer and that of the KVOC; the delivery of the designated Level 2 Major Town Centre at Leixlip (including Collinstown); and, the major enhancement of the quality and quantum of comparison floorspace in Naas, Maynooth and Athy, as well as other key centres in the County Retail Hierarchy.

8.1.1.2.2 Objective 2

'To ensure an equitable, efficient and sustainable distribution of main centres across the County'

This has been achieved through the strategic approach adopted in the 2005 County Retail Hierarchy, which has been reaffirmed in the GDA Retail Hierarchy. The latter has included the designation of Clane as a Level 3 Sub County Town Centre, which responds to both the growth of the centre but also the strategic deficiency in the County Retail Hierarchy within this part of the Central Sub Area of the County. This requires to be reaffirmed in the new County Retail Hierarchy. The gap, as has been highlighted, is that North East Kildare has not seen progress in the delivery of its Metropolitan Area Level 2 Major Town Centre. The statutory planning framework for this to be progressed is now in place.

8.1.1.2.3 Objective 3

'To confirm a hierarchy which assists in defining the County's settlement structure and objectives and provides clear guidance on where major new retail development would be acceptable'

The County Retail Hierarchy has provided the framework for the distribution of new retail floorspace – a framework that has worked effectively. This will be reinforced through the confirmation of Clane as a Hinterland Area Level 3 Sub County Town Centre in the new County Retail Hierarchy, which is consistent with that of the GDA Retail Strategy.

8.1.1.2.4 Objective 4

‘To ensure that the needs of the County’s residents are met as fully as possible within Kildare, taking due cognisance of the retail hierarchy set out in the GDA Retail Strategy’

The findings from the 2009 County Retail Strategy household and shopper surveys have demonstrated that there has been a modest improvement in the County’s market share of convenience expenditure, based on what was a high level of retention at 2001. As has been highlighted, of considerable importance is the very substantial decrease (14.0%) in comparison expenditure outflows in the interim period, which would indicate that overall delivery of this objective has been very successful. This noted, over the period of the new County Retail Strategy, there is a need to ensure that the level of convenience expenditure retention is sustained and for comparison spend market share to continue to witness further improvement with the following identified as key priorities:

- The continuing enhancement and expansion of main food shopping floorspace across the County’s main centres
- The continuing enhancement and expansion of the current comparison shopping offers of Newbridge and the KVOC
- The progression of the Leixlip (including Collinstown) as a Level 2 Major Town Centre in North East Kildare
- Substantial improvement in the retail offers, both main food convenience and mainstream comparison, in Naas, Athy, Celbridge, Clane, Kilcock, Kilcullen, Kildare and Maynooth
- Naas to fully realise its role and potential as a Level 2 centre in the GDA and County retail hierarchies, with a particular emphasis on the County Town realising a retail profile that provides for a significant enhancement in the quantum and quality of its middle and higher order comparison floorspace.

8.1.1.2.5 Objective 5

‘To encourage and facilitate the preservation and enhancement of the retail role of both individual villages and village/settlement clusters around the County’

Given the focus of the market on the higher order centres in the County Retail Hierarchy, there has been limited or no enhancement of the County’s Level 4 centres since 2001, with the exception being Sallins. To ensure that the retail role and needs of these smaller centres is sustained and enhanced, this requires to remain an important objective of the County Retail Strategy.

8.1.1.2.6 Objective 6

‘To encourage and facilitate the re-use and regeneration of derelict land and buildings for retail uses, with due cognisance to the Sequential Approach’

This objective has been successfully pursued and has resulted in:

- i. The regeneration of the Irish Ropes Site in Newbridge (Whitewater Shopping Centre), the Tesco anchored Town Centre Expansion Area in Maynooth and, sites within and on the edge of Sallins Town Centre;

- ii. The redevelopment/regeneration of the Corban's Lane area of Naas Town Centre (Naas Shopping Centre); and
- iii. The granted schemes for: the Geraldine Partnership Site (former Esta Site); the Greencore Site at Woodstock; and, the Raggett Site on Leinster Street in Athy; the Boylan's Garage Site in Celbridge; Kilcock Town Centre; and, the Neighbourhood Centre on Fisheries Lane in Naas.

The assessments of retail potential in Sections 5, 6 and 7 of the Strategy, consistent with RPG guidance and the GDA Retail Strategy, sustain the priority of the regeneration/redevelopment of such lands and buildings as part of the sustainable strategy for expanding from the heart of existing town centres.

8.1.1.2.7 Objective 7

'To promote and sustain the importance of retailing in the County's tourism economy'

Although there are a number of smaller scale successes, the real honeypot in terms of the County's attraction under this objective is the KVOC which draws large numbers of shoppers and visitors into the County. However, the benefits and linkages to Kildare Town as a whole are not being maximised, nor are those to the Level 2 Twin County Towns of Naas and Newbridge. This is an issue that requires to be squarely addressed through and over the timescale of the County Retail Strategy.

8.1.1.2.8 Objective 8

'To encourage and facilitate innovation and diversification in the County's retail offer and profile'

Not undermining the huge importance and success of the Whitewater Shopping Centre and the Naas Retail Parks, only the KVOC introduces a different retail offer and concept into the retail landscape of not only the County but wider GDA and country as a whole, noting that the Killarney (Kerry) and Rathdowney (Laois) FOC schemes would not generally be in accordance with the RPG definition of such centres. Ensuring the attraction and competitiveness of the KVOC, subject to any expansion of the centre meeting the tests of national, regional and local assessment criteria, will be important in order that the County Retail Strategy continues to deliver the aim of this objective.

8.1.1.2.9 Objective 9

'To provide the criteria for the assessment of retail development proposals'

The assessment criteria set out in the 2005 Strategy, and adopted into the County Development Plan have been an important mechanism in making decisions on retail planning applications.

8.1.2 Strategic Policy Framework

The 2005 Strategy identifies that the strategic policy framework that underpins the retail policies and proposals of the Strategy comprises the following:

- i. County Retail Hierarchy;
- ii. Sequential Approach;
- iii. Core Retail Areas;
- iv. Spatial Distribution of New Retail Development; and
- v. Consideration of Need.

8.1.2.1 County Retail Hierarchy

The County Retail Hierarchy, as revised in the 2005 County Development Plan specifically in respect of Leixlip (including Collinstown) being the designated Metropolitan Area Level 2 Major Town Centre to serve North East Kildare, has been effective and guided development. This is confirmed in the GDA Retail Strategy but with Clane now being recognised as Hinterland Area Level 3 Sub County Town Centre. In the new County Retail Strategy, additional centres that require to be specifically incorporated in the County Retail Hierarchy have been identified by the Council. All of these would be defined as Level 4 centres in the County, GDA and national retail hierarchies.

8.1.2.2 Sequential Approach

The principles of the Sequential Approach have been rigorously applied in decision making on planning applications and have successfully counteracted pressures for inappropriate edge and out of centre retail proposals.

8.1.2.3. Core Retail Areas

The review of the Core Retail Areas of the County's main centres has concluded the following:

- **Expansion:** to reflect recent and emerging changes in their retail offers the Core Retail Areas of Naas, Newbridge, Maynooth, Athy, Clane and Kildare Town require to be extended
- **Status Quo:** all other designated Core Retail Areas in the 2005 Strategy remain unchanged
- **Other Centres:** the position with other main centres in the 2005 Strategy remains the same at 2009, their retail floorspace is limited and widely distributed around the different centres and, as such, do not have what could be defined as a Core Retail Area. This is also the position with the new centres in the County Retail Strategy.

8.1.2.4 Spatial Distribution of New Retail Development

The guidance on what are the appropriate types of floorspace in different centres in the County Retail Hierarchy has been applied in decision making on retail applications and should continue to be upheld in the County Retail Strategy.

8.1.2.5 Consideration of Need

The high level of convenience expenditure market share and substantial increase in comparison spend retention confirm that the shopping needs of residents' of the County are being better met within Kildare than at 2001. There has been a significant two and a half times increase in total floorspace, which is greater than projected in the 2005 Strategy indicative capacity assessment. Expenditure market share will only be sustained if there is continuing enhancement of the quantum and quality of the County's retail floorspace, with a particular emphasis in further increasing comparison expenditure retention.

The 2005 Strategy recognised that vital and vibrant town centres were not just about shopping. It identified that there was a parallel need for the overall attraction of the County's centres, for both local people and visitors alike, to be greatly enhanced as retail and leisure destinations through a combination of environmental improvements, harnessing the asset of the unique heritage of many of Kildare's towns and villages and the encouragement of investment in supporting infrastructure – hotels, restaurants, bars and other leisure/tourism facilities. Although there have been a number of successes, it can be concluded that this is work in progress and for the County to sustain and enhance its attraction and competitiveness addressing this needs to gain momentum over the period of the County Retail Strategy.

8.1.3. Specific Policies & Proposals

8.1.3.1 Retail Policies for Towns & Settlements in Kildare

The specific policies and proposals for the different centres of the County were designed to facilitate the aims of the Strategy. The success of these policies and proposals and the remaining issues in respect of individual centres have been examined in the health checks of the centres in Sections 5, 6 and 7 and the responses required to be taken forward in the County Retail Strategy identified. The principles underpinning these retail policies remain appropriate for the County Retail Strategy.

8.1.3.2 General Retail Policies

In addition to specific policies relating to the different centres, a number of general policies were defined to shape retailing in the County in the 2005 Strategy. These are reviewed below.

8.1.3.2.1 Corner Shops & Smaller Villages/Crossroads

In response to the importance of small village centres and freestanding shops playing an integral component of life in rural Kildare, the 2005 Strategy sought to encourage their retention as well as that of local services. Since 2005, there has been a general decline in the number of corner shops and the offers of smaller villages/crossroads in the County, as has been the position across the country as a whole. It is, however, important that this remains a general policy objective of the County Retail Strategy.

8.1.3.2.2 Enhancement of Towns & Villages

The 2005 Strategy recognised the importance of the environment in attracting trade and sustaining the vitality and viability of centres. It set general policies to encourage enhancement and environmental improvement of the County's centres and also to ensure the best quality of design for all new retail development. On the whole, there has not been the level of investment anticipated in the public realm of the County's towns and villages and this, therefore, must remain a policy objective of the County Retail Strategy. In respect of the best quality of design in retail development, the Council has been constant in achieving this particularly within town and village centres. Given the slowdown in the economy, there is increasing pressure for costs to be cut in developments and this is often at the expense of good design. A long term view must be taken and the principle of best quality of design in retail developments sustained within the County Retail Strategy.

8.1.3.2.3 New District & Neighbourhood Centres

To ensure that the needs of existing and growing residential areas were met in a sustainable way, the 2005 Strategy encouraged the development of District and Neighbourhood centres in new and growing areas of population. Planning consent has only been granted for one District Centre – Monread District Centre in Naas. Additionally, there has only been a limited number of permissions for Neighbourhood Centres and an even lesser number actually built and trading. If traffic congestion is to be relieved in the County's main centres and needs better met locally then encouragement of new retail anchored centres, which provide a range of non retail and community services and functions, appropriate to the needs of the specific location, require to remain an important strand of the County Retail Strategy.

8.1.3.2.4 Re-Use & Regeneration of Derelict Land & Buildings

This is one of the nine objectives of the 2005 Strategy and its effectiveness has been reviewed. It requires to remain an important objective in the County Retail Strategy.

8.1.3.2.5 Retailing in Tourism & Leisure

This is also one of the nine objectives of the 2005 Strategy and its effectiveness has been reviewed. It requires to remain an important objective in the County Retail Strategy.

8.1.3.2.6 Casual Trading

In response to the issue of casual trading, the 2005 Strategy set out general policies to control and where appropriate restrict this activity, in accordance with the Council's statutory functions under the Casual Trading Act 1995. The evidence is that this has been an effective policy and requires to be sustained in the County Retail Strategy.

8.1.3.2.7 Amusement/Gaming Arcades

The 2005 Strategy identified that amusement/gaming arcades were an undesirable use and potentially detrimental to the business and commercial environment of the County and in response incorporated a general policy which committed to refusing planning applications for such purposes. As with casual trading, the evidence is that this has been an effective policy and requires to remain one in the County Retail Strategy.

The objective of protecting and enhancing the vitality and viability of town centres and their business and commercial environments has been a key objective of the Council. Although there were no policies in respect of other non retail uses within or around designated Core Retail Areas or on other main streets in the 2005 Strategy, the policy framework for restricting these requires to be introduced in the new County Retail Strategy if town centre vitality and ambience is to be sustained and improved. This needs to address a number of uses and issues including: bookmakers; off licences; hot food take aways; non retail uses on main streets; banks/financial institutions; and, dead frontages.

8.1.3.2.8 Innovation in the County's Retail Offer

This is one of the nine objectives of the 2005 Strategy and its effectiveness has been reviewed. It requires to remain an important objective in the County Retail Strategy.

8.2 2008 GDA Retail Strategy – Strategic Guidance

Section 1 has summarised the objectives of the 2008 GDA Retail Strategy which are set to guide retail planning across the County and wider GDA. Based on these, the Regional Retail Strategy provides strategic guidance on different facets of retail planning that require to be taken account of in the preparation of the County Retail Strategy. The key guidance which was not already inherent in the 2005 Strategy is summarised in the paragraphs that follow.

8.2.1 Retail Strategy Vision – Comments on Existing Position

8.2.1.1 New Centres

The GDA Retail Strategy advises that there is a limited quantitative case for the provision of new centres outside of those planned in the RPPGDA or current Development Plans/LAPs. As such it advises that the allocation of additional district and local centres will have to be put forward mainly on a qualitative basis. They should generally be designed to meet the week to week shopping needs of new communities. This is the approach that has been applied in the determination of planning applications for such centres by the Council and Naas and Athy Town Councils, and will remain the case under the County Retail Strategy.

8.2.1.2 Retail Developments in Defined Major Town or County Town Centres

An important departure from how retail applications around the GDA and country as a whole have generally been assessed is that the Regional Retail Strategy promotes that where an application is made within existing defined Major Town or County Town Centres that:

'...it will not always be necessary to demonstrate the quantitative need for retail proposals in assessing such proposed developments.'

Instead, the strategy advises that in setting out the retail impact, the focus should be on how the scheme will add/detract from the quality of the town centre in respect of improving the retail offer, urban design, integration with the built fabric and quality of life within the town/centre. However, this only applies to town centres and edge of centre or proposals not in compliance with the retail hierarchy should have a full assessment, specifically in respect of the tests of the Sequential Approach.

This is a sound and sensible approach to the retail planning of the County's Level 2 centres and is in compliance with what the RPG assessment criteria actually require in respect of retail applications, as set out under paragraph 65 of the guidelines. It is guidance that requires to be incorporated in the County Retail Strategy's assessment criteria, with clarity provided on where such an approach is appropriate.

8.2.2 Retail Hierarchy for the GDA

8.2.2.1 Structure of GDA Retail Hierarchy

Table 6.1 of the Regional Retail Strategy sets out the GDA Retail Hierarchy. It does not, however, distinguish between the Metropolitan and Hinterland Areas of the GDA or the designation of what different centres are within the different levels, such as for example whether Celbridge is a Level 3 Town and/or District Centre or a Sub County Town Centre. The strategy advises that it is up to local authorities in their retail strategies to determine the designation of towns at this level in the hierarchy. The GDA Retail Strategy does not identify centres at Level 4 in the GDA Retail Hierarchy. As such, it is assumed that this too is left for determination in the County Retail Strategy.

8.2.2.2 Size of Level 3 Sub County Town Centres

In paragraph 6.11, the GDA Retail Strategy states the following in respect of the size of Sub County Town Centres:

'However, for a certain limited number of district/sub-county town centres within Level 3, located or proposed for areas of extensive and intense high density development providing for new towns/areas of over 10,000 population, the guideline of a maximum of 20,000 sq m net of retail provision can be extended by 10-15,000 sq m of lettable floorspace to reflect the dense urban character of the development and the high population located within a short walking distance of the centre – where the area is not already served by an existing centre. Clear justification will be need to be included in any City/County retail strategy outlining the case to support such a designation.'

The paragraph does not reflect the character of Sub County Town Centres and is interpreted to apply only to Level 3 District Centres in the Dublin conurbation, given that only in the Dublin area under the RPG are District Centres likely to comprise up to 20,000m² net of retail floorspace. The basis of this interpretation is reinforced in Footnote 31 of the 2008 GDA Retail Strategy. The footnote relates to the paragraph and advises only on District Centres. It makes no reference to Sub County Town Centres as is shown by the following:

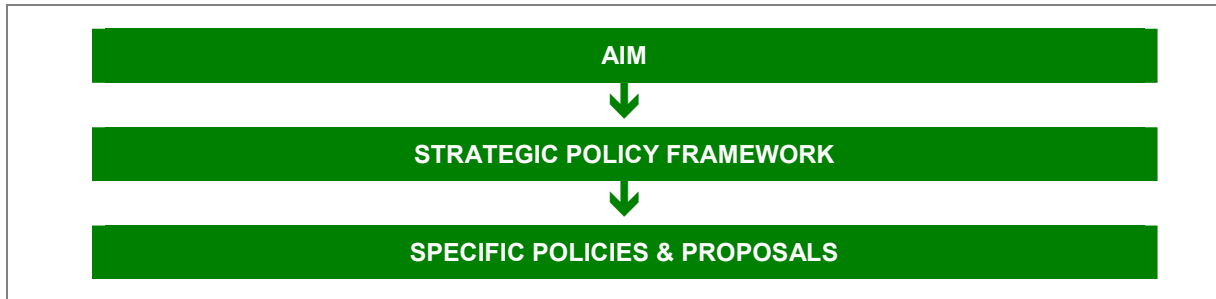
'31. These figures are guideline thresholds. The maximum and minimum size for district centres should be defined in the relevant statutory development or local area plan.'

Therefore, in the County Retail Strategy the threshold will not be applied to Level 3 Sub County Town Centres. The appropriate size of Sub County Town Centres will be determined through the policies and objectives of the relevant Development Plans and LAPs and those of the County Retail Strategy for each respective centre. Guidance on what the appropriate order of size District Centres are likely to be in the relevant centres in the County Retail Hierarchy needs to be set in the County Retail Strategy, which will be in accordance with the RPG guidance on the likely size of District Centres outside of the Dublin area.

9.0 STRATEGIC RESPONSE – THE COUNTY RETAIL STRATEGY

Every retail planning strategy must be clear as to its purpose and what it is intended to achieve. This was achieved in the 2005 Strategy. As such, it is built on in the 2010 County Retail Strategy. To this end, the key considerations that provided the foundations for the 2005 Strategy have been taken and outlined in a step by step framework which is consistent with that set out in the County Development Plan 2011 – 2017. This is summarised in Figure 9.1.

Figure 9.1 County Retail Strategy Framework



The principles underpinning the County Retail Strategy have been informed by the requirements of the RPG, the 2008 GDA Retail Strategy, review of the 2005 Strategy, the current baseline, retail market trends and responding to the retail issues and opportunities that prevail in the County's main centres and across Kildare as a whole. Within this context, the **aim** and **objectives** of the County Retail Strategy set the framework for the Strategy's specific policies and proposals. They, thus, provide a clear definition of the purpose of the Strategy and what it is intended to achieve across the County over the period 2008 – 2016 and beyond to 2022, the end year of both the emerging NSS and RPPGDA.

9.1 Aim

The aim or goal of the Council is:

To continue to sustain and improve the retail profile and competitiveness of County Kildare within the retail economy of the Greater Dublin Area and beyond, through harnessing the assets and potential of centres at all levels of the County Retail Hierarchy.

9.2 Objectives

The retail planning objectives of the Council are:

- **Objective 1:** To ensure that the retail needs of the County's residents are met as fully as possible within Kildare, taking cognisance of the Regional Retail Hierarchy set out in the GDA Retail Strategy, to enable the reduction in the requirement to travel to meet these needs and in the interests of achieving greater social inclusion and accessibility to shopping and services across all sectors of the community.
- **Objective 2:** To reinforce the retail hierarchy which assists in defining the County's settlement structure and provides clear guidance on where major new retail floorspace would be acceptable.
- **Objective 3:** To ensure an efficient, equitable and sustainable spatial distribution of main centres across the County in the interests of the proper planning and sustainable development of the area.
- **Objective 4:** To continue to address leakage of retail expenditure from Kildare through

securing the development of the appropriate quality and quantum of additional convenience, comparison and bulky goods floorspace in centres across the County.

- **Objective 5:** To sustain and enhance the increase in comparison expenditure inflows to the County and its attraction as a retail destination in the GDA and beyond through delivering a quality and quantum of retail offer in the existing and newly designated main centres in the County Retail Hierarchy.
- **Objective 6:** To reinforce the heart of town and village centres as the priority location for new retail development, with quality of design and integration/linkage being fundamental prerequisites.
- **Objective 7:** To align, as far as practicable, new retail development with existing and proposed public transport infrastructure and services and encourage access by foot and bicycle to reduce the dominance of access by private car.
- **Objective 8:** To encourage and facilitate the preservation and enhancement of the retail and services role of both individual villages and village/settlement clusters around the County.
- **Objective 9:** To encourage and facilitate the re-use and regeneration of derelict land and buildings for retail and other town centre uses, with due cognisance to the Sequential Approach and building on the progress that has been achieved to date.
- **Objective 10:** To promote and sustain the importance of retailing and other supporting infrastructure in the County's important tourism economy.
- **Objective 11:** To encourage and facilitate innovation and diversification in the County's retail profile and offer.
- **Objective 12:** To provide the criteria for the assessment of retail development proposals.

9.3 Policy Statements

Consistent with the County Development Plan 2011 – 2017, the policy statements underpinning the County Retail Strategy have been divided into three categories:

- i. Strategic Policy Framework;
- ii. Retail Policies for Towns and Settlements in the County; and
- iii. General Retail Policies.

9.4 Strategic Policy Framework

The strategic policy framework that provides the foundations for both the specific retail policies and proposals and general retail policies of the County Retail Strategy addresses the specific requirements and guidance of both the RPG and the GDA Retail Strategy and the objectives set out above. It comprises:

- County Retail Hierarchy
- Sequential Approach
- Core Retail Areas

- Spatial Distribution of New Retail Development
- Consideration of Need.

9.4.1 County Retail Hierarchy

PolicySP1: County Retail Hierarchy

It is the policy of the Council to guide major retail development in accordance with the framework provided by the County Retail Hierarchy (Table 9.1) to enable an efficient, equitable and sustainable distribution of floorspace throughout the County.

Table 9.1 confirms the appropriateness of the proposed County Retail Hierarchy within the context of the GDA Retail Hierarchy and is established from a detailed review of all of the main centres in the County since the 2005 County Development Plan hierarchy was adopted. As with the County Development Plan 2011 – 2017, in contrast with the Regional Retail Hierarchy, it differentiates between the Metropolitan and Hinterland Areas of the County and identifies as appropriate sub-tiers within Levels 3 and 4 of the GDA Retail Hierarchy and the main centres at Level 4 in the hierarchy. It does not materially affect the principles set down at the regional level but responds to the different characteristics of the County and its main centres and the need to provide the clarification sought by the RPG in respect of retail hierarchies. The key changes in the County Retail Hierarchy since the 2005 Strategy was prepared are:

- i. The designation of Leixlip (including Collinstown), as the Metropolitan Area Level 2 Major Town Centre to serve North East Kildare, which was confirmed in the GDA Retail Strategy and anticipated over a twenty year timeframe;
- ii. Clane becoming designated as a Tier 1 Level 3 Sub County Town Centre within the Central Sub Area of the County;
- iii. Sallins being elevated from a Tier 1 Level 4 Small Town Centre to a Tier 2 Level 3 Town Centre, reflecting the growth of the town and the increase in retail floorspace that has prevailed; and
- iv. The inclusion of additional centres that are covered by adopted or emerging Local Area Plans as Tier 2 Level 4 Village Centres in the County Retail Hierarchy.

Table 9.1 County Retail Hierarchy

Level	Metropolitan Area	Hinterland Area
Level 2	Major Town Centres	Twin County Town Centres
	Leixlip (including Collinstown)	Naas and Newbridge
Level 3	Town Centres	Sub County Town Centres/Town Centres
		Tier 1 Level 3 Sub County Town Centre Athy, Clane and Kildare Town
	Celbridge, Kilcock and Maynooth	Tier 2 Level 3 Town Centre Kilcullen, Monasterevin and Sallins
Level 4	Village Centres	Local Centres – Small Towns & Village Centres
		Tier 1 Small Town Centres Castledermot, Prosperous and Rathangan
		Tier 2 Village Centres Allenwood, Athgarvan, Ballitore/Crookstown/ Moone/Timolin, Ballymore-Eustace, Derrinturn, Johnstown, Kill, and Killeel
Level 5	Corner Shops	Smaller Village Centres/Crossroads/Rural Settlements

Source: DBCL 2010

9.4.2 Sequential Approach

The importance of the Sequential Approach in respect of sustaining and protecting the vitality and viability of centres is a key priority in the County Retail Strategy. It is, thus, reinforced in the strategic policy framework for guiding new retail development. Proposals for retail schemes in the County's centres at whatever level in the County Retail Hierarchy are, therefore, required to take due cognisance of this as follows:

- In the first instance, the priority should be in locating retail development in town centres or village 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** of a centre, and less in smaller settlements.
- Only after the options for town centre (or village centre) and edge of centre sites are exhausted should out of centre locations and sites be considered.

PolicySP2: Sequential Approach

It is the policy of the Council to guide retail development where practical and viable in accordance with the framework provided by the Sequential Approach to enable the vitality and viability of existing town, village and district centres to be sustained and strengthened.

9.4.3 Core Retail Areas

PolicySP3: Core Retail Areas

It is the policy of the Council to define the Core Retail Area of the County's main centres to provide guidance on the application of the Sequential Approach.

The designated Core Retail Areas of the County's main centres are illustrated in Sections 5, 6 and 7, with each section highlighting where there has been an expansion of the area since the preparation of the 2005 Strategy. It is recognised that not all centres in the County Retail Hierarchy have definable Core Retail Areas. In the absence of this, the Sequential Approach should be based on what would be the recognised central point within the individual centre, which is recommended as being agreed between applicants and the Council at pre-planning meetings, or as an outcome of such meetings. Below, where Core Retail Areas are able to be defined, their extents at a settlement level are broadly summarised in alphabetical order:

- i. **Athy:** extends along Leinster Street to the east and Duke Street to the west within the town centre, and has extended eastwards in the interim period since the 2005 Strategy was prepared;
- ii. **Celbridge:** the area of Liffey Bridge along Main Street to the south of the Maynooth Road, which has not expanded since the 2005 Strategy was prepared;
- iii. **Clane:** Main Street, from the north side of the Prosperous Road to the Celbridge/Kilcock Roads junction, which has been expanded through the new development at the corner/junction of Main Street and the Prosperous Road;
- iv. **Kilcock:** Bridge Street, New Lane and School Street, with no expansion in the interim period;
- v. **Kildare Town:** Dublin Street west of Beechgrove along Claregate Street to junction with Bangup Lane and Market Square, with expansion into the Market Square area in recent years. Although the KVOC is a key part of the town's retail offer, it is not part of the designated Core Retail Area;
- vi. **Leixlip:** Leixlip Road junction with Main Street/Captains Hill to Rye Bridge, which has not expanded since the 2005 Strategy was prepared. The delivery of the Level 2 Leixlip (including Collinstown) Major Town Centre will change the dynamics of this but this is anticipated to be the subject of the next review and update of the County Retail Strategy;
- vii. **Maynooth:** following the delivery of the Manor Mills Shopping Centre, the town's Core Retail Area has expanded to comprise Dillons Row along Main Street to the Leinster Street Junction and from Main Street to and including the Manor Mills Shopping Centre;
- viii. **Naas:** as a consequence of the pending completion and opening of the Corban's Lane/Naas Shopping Centre scheme, the town's defined Core Retail Area now comprises Poplar Square along Main Street North and Main Street South to the Fairgreen and covering the Naas Shopping Centre; and
- ix. **Newbridge:** with the development of the Whitewater Shopping Centre, which has become the prime pitch in the town centre, the Core Retail Area now comprises Whitewater Shopping Centre, Town Square along Edward Street and Main Street to Riverbank Arts Centre.

9.4.4 Spatial Distribution of New Retail Development

The County Retail Strategy, in accordance with the RPG and informed by the GDA Retail Strategy, provides the strategic policy framework for the spatial distribution of 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 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, including smaller main 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 County Retail Strategy defines the distribution of strategic and non-strategic retail floorspace within the County Retail Hierarchy:

- **Level 1 – Metropolitan Centre:** major convenience and comparison
- **Level 2 – Major Town and County Town Centres:** major convenience and comparison
- **Level 3 – Town and Sub County Town Centres:** large scale convenience and middle order comparison, but not excluding higher order comparison particularly that related to the tourism economy
- **Level 4 – Village Centres and Small Town Centres:** predominantly additional convenience but not excluding tourism related comparison.

Additionally, the Strategy recognises the need to ensure that local needs, primarily convenience shopping and local services, are met in an efficient, equitable and sustainable way in large existing or new residential areas in and around main centres through the designation of retail centres in Development Plans and Local Area Plans. Comparison floorspace will be limited in such centres to lower order to ensure the primacy for higher and middle order comparison shopping remains in the town centre.

9.4.5 Consideration of Need

The County has witnessed an increase in its convenience and comparison expenditure market share and its comparison trade draw since the 2005 Strategy was prepared. The improvements in comparison spend retention and inflows are particularly significant with outflows being reduced from 47.0% to 33.0% and inflows increasing from 6.0% to 15.0% since the 2001 GDA Retail Strategy household and shopper surveys were undertaken. This indicates that the policies and proposals in the 2005 Strategy have been successful, particularly in the light of the major improvements in the quantum and quality of retail floorspace that have taken place in the GDA and in other neighbouring counties.

It is, however, a very dynamic and competitive sector of the economy and the County needs to ensure that market share and trade draw are maintained in convenience shopping and sustained and enhanced in respect of comparison. The latter is particularly important as the quantum and quality of the County's comparison floorspace are the drivers of its retail attraction and competitiveness in local, regional and national shopping patterns and both are key to ensuring that Kildare continues to be an attractive location for living, working, leisure and investing in. The quality of the County's retail offer is also important in helping to reduce the need for residents of the County having to travel to meet their shopping needs.

The positive response to shopping needs being better met in the County is demonstrated by the significant increase in retail floorspace that has taken place between 2001 – 2009, with total net floorspace increasing by the order of two and a half times from 67,368m² to 172,387m² over the period. Looking forward, the broad assessment of the need for additional retail floorspace (Table 3.5) provides both the scope and potential for needs to continue to be met in a more efficient, equitable and sustainable way and the County to continue to sustain and enhance its importance and attraction in shopping patterns.

Although overall the improvement in the County's retail offer has been effective in stemming outflows and enhancing inflows of expenditure, the assessment of the retail potential of the County's main centres has identified that the improvement in the County's retail offer has not matched the County Development Plan policy objectives for all of the centres in the County Retail Hierarchy. It has also not been evenly distributed

with North East Kildare still lacking its Level 2 Major Town Centre and major enhancements in Athy still to come to fruition, both vital to stem leakage from the north east and south of the County respectively. Additionally, there remains a need for convenience shopping to be improved across the majority of centres in the County and the quality and quantum of comparison floorspace to be enhanced, particularly in the County's Level 2 and Level 3 centres. The County Retail Strategy provides the policy framework for this to be achieved in the specific policies and proposals for the County's main centres.

As has been highlighted in the review of the 2005 Strategy, while the quality and quantum of retail floorspace is of considerable importance in the County's attraction and competitiveness, the overall attraction of its centres is a key factor in the equation. There continues to be a need for the overall attraction of the County's centres, for local people and visitors alike, to be greatly enhanced as retail and leisure destinations through a combination of environmental improvements, harnessing the asset of the unique heritage and waterfronts of many of Kildare's towns and villages and encouraging investment in supporting infrastructure – hotels, restaurants, bars and other leisure/tourism facilities.

9.5 Retail Policies for Towns & Settlements in Kildare

The specific policies and proposals of the County Retail Strategy are designed to facilitate achievement of the aims of the Strategy. As in the 2005 Strategy, they are formulated to ensure:

- i. Existing or emerging issues in the County's retail profile and that of its centres have the policy framework to be addressed;
- ii. The County has the policy framework to ensure strategic and local convenience and comparison shopping needs are met and the competitiveness and attraction of its main centres is enhanced; and
- iii. The expenditure capacity for additional floorspace is harnessed over the timescale of the Strategy and beyond to 2022 (Table 3.5).

9.5.1 Hinterland Area: Twin County Town Centre – Naas

RP 1 Hinterland Area: Twin County Town Centre – Naas

It is the policy of the Council to promote and encourage major enhancement and expansion of retail floorspace and town centre functions in the Hinterland Area Twin County Town of Naas to reflect its role as a major town centre and further develop its competitiveness and importance as a key centre in the GDA.

Naas is recognised as one of the fastest growing towns in the GDA and country and this position has been sustained over the last decade. This is set to continue and as a designated Large Growth Town Type (I) in the Draft RPPGDA 2010 – 2022 is projected to grow over the period of the County Retail Strategy and beyond. Although the largest town in the County, until recently Naas had substantially less retail floorspace than Newbridge, the County's other Level 2 Hinterland Area Twin County Town Centre. Naas is now the largest retail centre in the County. While it has a greater quantum of retail floorspace than Newbridge, the quality of its offer, and in particular its comparison offer, still does not match its role and potential as a key retail destination that is comparable to Newbridge or the majority of other Level 2 centres in the GDA.

In respect of Naas' attraction and competitiveness, it has one of the best bulky goods shopping offers in the Region and has a renowned range of quality women's clothing and shoe shops that are recognised for drawing trade from the town's affluent hinterland and further afield. Additionally, it has the Naas Shopping Centre which is currently under construction and a number of planning consents in the pipeline that will continue to enhance the quantum of its retail offer, both convenience and comparison. Of key importance is that these permissions alone are unlikely to enhance Naas' retail market penetration and competitiveness beyond its current catchment area. The key issue which continues to remain is the quantum and quality of Naas' mainstream comparison offer, and particularly its higher and middle order floorspace. It does not

have the retail profile which generally characterises higher order retail centres in the national and regional retail hierarchies and redressing this is a key policy objective of the County Retail Strategy.

Naas is a busy and thriving town with a unique heritage and streetscape, including the untapped potential of its hidden waterfront. It has witnessed a number of key environmental improvements in recent years. The town also has a good supporting commercial leisure infrastructure – hotels, restaurants, cafes, bars and a multiplex cinema. However, there is a recognised decline in the heart of the centre in recent years with increased vacancies and pedestrian and vehicular conflict. A particular issue is the significant volume of traffic going through the town centre, combined with the limited availability of off street car parking, which is recognised as disrupting the retail and commercial life of the heart of the town. There is, therefore, a need to redress the issues and creatively harness the assets that distinguish the town from other centres to enable Naas to grow into a quality retail and leisure destination, as has been achieved in Kilkenny.

Looking beyond the town centre, the town has to ensure that the needs of its existing and expanding residential areas are better met, particularly in respect of modern format convenience floorspace and local services. It is recognised that there is limited potential for these needs to be met in either town centre or edge of centre locations. Nor is it desirable that prime town centre sites be lost to meeting convenience needs given that the priority must be on ensuring that it is the location for higher and middle order comparison floorspace and also in view of the high traffic generated by large convenience stores. These needs require to be met in a network of retail centres in the town's suburbs and the appropriate locations zoned in Development Plans. In order to ensure that none of these centres have the potential to compete with the comparison shopping offer of the town centre, any comparison floorspace permitted will be limited in quantum and also to lower order comparison shopping.

As has been highlighted, Naas is the County's prime location for bulky goods shopping. There is, however, evidence that this market is largely saturated. As this has resulted in pressure on retail warehousing floorspace being used for either large space comparison or mainstream or discount convenience shopping, it is not considered appropriate to permit further new retail warehousing zoned lands. It is a position that will require to be monitored over the timescale of the County Retail Strategy to ensure that the town and County sustain their attraction and competitiveness in this market sector.

For Naas to deliver the objective of its specific policy, the Council and Naas Town Council will require to work closely together to progress the town growing into its role and potential as a Level 2 retail destination in the GDA Retail Hierarchy. There are a number of key actions and locations which provide the framework for this to be realised. These include the following:

- i. A vision for Naas Town Centre is required that is created through the Councils working in partnership with local organisations, businesses and people. This should be in parallel to continued investment in the improvement of the public realm;
- ii. The regeneration of the Superquinn and Tesco/Penneys Shopping Centre sites should be retail driven, with the delivery of higher and middle order comparison floorspace being the key priority of the Councils. This will be facilitated by the proposed relocation of Superquinn to the VEC Site and Tesco to the Monread District Centre;
- iii. The objective of securing the development potential of the Eircom site and adjacent lands backing onto the Grand Canal, to better link the town centre with its waterfront and enable retail-led town centre expansion;
- iv. The priority that there is the re-use and regeneration of backlands to the rear of both North and South Main Street which should make an important contribution to the enhancement of the quality of the town's comparison offer; and
- v. Identification in the Development Plan of locations for retail centres in existing and expanding residential areas.

It is the policy of the Council:

- **RP 2** *To work in partnership with local organisations, businesses and people in the development of a vision for Naas Town Centre.*
- **RP 3** *To support and implement appropriate development of lands for the future expansion of Naas Town Centre within the town centre, with priority being on the regeneration/redevelopment of derelict lands and buildings and the better integration of the town centre with its waterfront.*
- **RP 4** *To sustain Naas' role and importance as a key bulky goods shopping destination in the County and wider GDA.*
- **RP 5** *To progress the implementation of the recommendations of the 2003 Naas IFPLUTS study and 2007 Naas Traffic Management Plan and facilitate the removal of traffic congestion and parking issues.*
- **RP6** *To pursue all avenues of funding to secure the resources for the enhancement, renewal and regeneration of the public realm of Naas Town Centre.*
- **RP7** *To encourage and facilitate the development of appropriately located retail centres to meet the needs of existing and growing areas of the town and to encourage innovation and diversification in the town's retail profile and offer.*

9.5.2 Hinterland Area: Twin County Town Centre – Newbridge

RP 8 Hinterland Area: Twin County Town Centre – Newbridge

It is the policy of the Council to promote and encourage the continuing enhancement and expansion of the Hinterland Area Twin County Town of Newbridge to sustain and further improve its role and importance as a key retail destination in the County and GDA.

Although Newbridge is no longer the largest retail centre, it is the most important comparison shopping retail destination in Kildare with mass appeal that extends beyond the County's boundaries, as recognised in shopper surveys and the GDA Retail Strategy. This is based on the combined quality and quantum of the Whitewater Shopping Centre's and Penneys' higher and middle order comparison offer, which have elevated the town to one of the most important Level 2 centres in the GDA. As a result of the town centre location of both, they have been able to provide the catalyst for the major improvement in the ambience and attraction of Newbridge Town Centre through the increased footfall and town centre activity that has been generated. It has been further enhanced with the introduction of the cinema, as part of the expansion of the Whitewater complex. This is an important boost to the evening and night time ambience of the town centre and a further benefit to trade in local restaurants, cafes and bars.

It has been noted that the retail sector is one of the most dynamic and competitive in the economy. Therefore, over the period of the County Retail Strategy and beyond, the priority is for Newbridge to sustain and enhance its role and importance in the national and regional retail hierarchies. Unlike the majority of higher order centres in the GDA and wider country, Newbridge has the scope and potential to achieve this within the town centre through the regeneration of land and buildings and also key areas of the traditional town centre. The objective must be to maximise the potential of regeneration to consolidate, integrate and visually improve the town centre. In addition to former industrial lands, the opportunities and focus should be on:

- i. The upgrading/redevelopment of the Moorefield/Dunnes Shopping Centre and adjacent lands; and

- ii. The revitalisation and better linkage and integration of the Edward Street/Main Street North/Charlotte Street/Eyre Street area with the remainder of the town centre.

It is anticipated that the further expansion of Newbridge's retail and town centre offer will require to be progressed in tandem with strategic road improvements, including the Southern Relief Road and new bridge crossing, and these therefore require to be kept as a priority on the agenda.

In contrast to Naas, Newbridge's retail profile is recognised as being what generally characterises a higher order retail centre, with of its 40,572m² net total floorspace some 17.8% is convenience, 61.4% comparison and 20.8% bulky goods. However, since 2001, Newbridge has not witnessed any improvement in its bulky goods offer although the 2005 Strategy identified that there was scope for enhancement on edge of centre sites, with a specific commitment that this should not encroach on lands that should be earmarked for future town centre expansion. It was not envisaged that this would happen until post 2006. In the interim period, very different market conditions have emerged with the bulky goods market in the Central Sub Area of the County generally being saturated. As a result, it is unlikely that Newbridge will see any improvement in its bulky goods offer, at least for the foreseeable future. It is a position that needs to be monitored over the timescale of the County Retail Strategy.

Newbridge is the second largest town in the County and, as with Naas, has rapidly grown in population over the last decade. Reflecting this, it is only one of two designated Large Growth Town Type (II) in the County in the Draft RPPGDA. Such centres are projected to achieve populations of between 15,000 – 25,000 over the period to 2016 and beyond. Newbridge, with a population of 18,520 at 2006, is well on course to exceed the upper level of 25,000 within this timescale. However, while the focus has been predominantly on the town centre, the convenience and local services needs of Newbridge's existing and expanding residential areas have not been met through the delivery of retail centres, which was recognised as a key strand of policy in the 2005 Strategy. The programmed review of the LAP needs to provide the guidance and land use zonings for this to be achieved.

For Newbridge to continue to sustain and enhance its role and attraction as a key retail destination in the national and regional hierarchies as well as better meet the needs of local people and its hinterland population, it is the policy of the Council:

- **RP 9** *To support and implement the appropriate development of lands for the future expansion of Newbridge Town Centre.*
- **RP 10** *To provide the framework for a more integrated approach to the planning of the town centre through the forthcoming Local Area Plan, with the Edward Street/Main Street North/Charlotte Street/Eyre Street area being a particular focus for achieving greater linkage and commercial synergy.*
- **RP 11** *To continue to enhance the profile of Newbridge through strategic environmental enhancement, the creation of spaces and places of interest and the introduction of public art.*
- **RP 12** *To identify locations for retail provision as appropriate within existing and expanding residential areas in the forthcoming Local Area Plan.*

9.5.3 Metropolitan Area: Major Town Centre – Leixlip (including Collinstown)

In accordance with the 2001 GDA Retail Strategy, Leixlip (including Collinstown) was designated as the location for the Metropolitan Area Level 2 Major Town Centre to serve North East Kildare in the County Development Plan to respond to the high levels of population growth in the area in the County and GDA contexts and to counteract the high levels of expenditure leakage, particularly comparison from this strategic Sub Area of the County. The 2008 GDA Retail Strategy included the development of Collinstown into the Regional Retail Hierarchy. The detailed framework of what this should evolve into over the next

twenty years is set out in the 2010 Collinstown LAP, the key characteristics of which are prescribed as being:

- i. Development of a centre attractive to leading national and multiple retailers to compete with other Metropolitan Level 2 Major Town Centres such as Liffey Valley, Blanchardstown and Dundrum;
- ii. Provision of integrated leisure facilities such as multiplex cinema, bowling alley and theatre;
- iii. Redress of the deficit of existing shopping facilities in the Leixlip and North East Kildare area;
- iv. Provision of a new railway station on the Maynooth – Connolly commuter rail line;
- v. Provision of a Park and Ride facility;
- vi. Potential to be served by a Quality Bus Corridor (QBC) and local bus interchange;
- vii. To have excellent high capacity road connections to the new Level 2 Metropolitan Area centre and the three Metropolitan Area Level 3 centres in the North East Sub Area of the County;
- viii. To be linked by dual carriageway to the Celbridge/Leixlip West junction of the M4 which has spare capacity; and
- ix. To provide a context for the detailed design and development of the lands within a site Masterplan.

The above provide the strategic principles underpinning the delivery of the new Level 2 Major Town Centre over the period of the County Retail Strategy and beyond. Within the mixed use development strategy, it is envisaged that development will be phased and include a mix of places and spaces to ensure the new town centre has an identity and character. The detail of this will be the subject of a masterplan covering the designated area, as required by the LAP. In respect of retail floorspace, based on a review of the size and potential of other Level 2 Major Town Centres, it is envisaged that the new centre will ultimately comprise some 65,000m² of comparison retailing with associated ancillary retail services and activities.

In parallel, although recognising its limited potential for any major enhancement, the framework requires to remain in place for the vitality, viability and attraction of Leixlip Town Centre to be sustained and enhanced. The 2010 Leixlip Local Area Plan promotes the continued promotion of the enhancement and consolidation of the traditional heart of Leixlip Town Centre, including the creation of a new street between Captain's Hill and Mill Lane that will provide for a range of town centre uses. In addition, there is the yet relatively untapped potential of the town's heritage and tourism asset, which requires to be harnessed.

It is the policy of the Council:

- RP 13** *To assist in the promotion and expansion of Leixlip (including Collinstown) as the Level 2 Major Town Centre in the Metropolitan Area of North East Kildare over the next twenty years to ensure that the retail needs of this area of the County, consistent with regional retail policy, are fully met and enable it to grow into one of the key retail centres within the GDA.*
- RP 14** *To work with development interests/landowners, other key stakeholders including local organisations, businesses and people in the development of the detailed masterplan for the area zoned Major Town Centre in the 2010 Collinstown Local Area Plan.*
- RP 15** *To work with national and regional bodies to ensure that the strategic infrastructure is programmed and implemented to ensure the phased development strategy for the new Level 2 Metropolitan Area Major Town Centre is progressed.*
- RP 16** *To sustain and enhance the retail and services offer of Leixlip Town Centre and harness the potential of its heritage asset.*

9.5.4 Metropolitan Area: Town Centres – Celbridge, Kilcock & Maynooth

Celbridge, Kilcock and Maynooth, along with Leixlip, were all examined as potential locations for North East Kildare's designated Metropolitan Area Level 2 Major Town Centre. In view of the differing constraints of each centre, Collinstown was selected as the location for the new centre. Celbridge and Maynooth are the third and fifth largest settlements in the County Settlement Hierarchy, with Kilcock improving its position from tenth to ninth over the period 2002 – 2006. Since the 2001 GDA Retail Strategy floorspace survey was undertaken Maynooth has evolved into becoming the third largest retail centre in the County. Celbridge, although larger in population than Maynooth, is significantly underperforming in its role as a Level 3 Metropolitan Area Town Centre in the County Retail Hierarchy. In respect of Kilcock, this is a centre that was recognised to be in decline at the time the 2005 Retail Strategy was prepared and this position has been perpetuated in the interim period. As Level 3 Metropolitan Area Town Centres, the following approaches are required for each in order to harness their potential and redress the issues:

- i. **Celbridge:** has sustained its position of becoming the third largest settlement in the County since 2002. Although, the town has experienced a 61.5% increase in its total floorspace since 2001, for a town of its size and importance in the GDA and County settlement and retail hierarchies it is underperforming in respect of meeting both strategic and local needs. It has been recognised that due to the nature and importance of the townscape, it is unlikely that any major expansion of retail and other town centre functions will be able to be realised in the heart of the town centre. The key potential for needs to be met is by enhancement/consolidation through the integrated delivery of the Donaghcumper Town Centre Expansion Area, as defined in the Action Area Plan covering the area, with retail and town centre uses being proximate to the traditional heart of the town centre. This requires to be pursued in parallel to the development/regeneration of town centre infill and Main Street backland sites and that of the Mill Complex on the edge of the town centre as a new mixed use residential, commercial leisure and retail quarter. There also needs to be enhanced linkage between the Tesco Shopping Centre and the Core Retail Area in applications for the redevelopment/regeneration of backlands to the north/north west of the Core Retail Area. This is in addition to the identification of a mix of retail provision within expanding residential areas of the town;
- ii. **Kilcock:** was an important market town in the County but, although the population of the town has grown, its heart and vitality/viability have been in serious decline. Positively, there is a grant for the retail-led mixed use regeneration of an important part of the Core Retail Area of the town centre. It, however, is not significant enough to address the very real shopping needs of this Level 3 centre in the County Retail Hierarchy. As such, in addition to better responding to the needs of Kilcock's existing and expanding residential areas, the appropriateness of the framework for the delivery of a quantum and quality of retail and other town centre uses beyond Kilcock's designated Core Retail Area requires to be examined in detail under the tests of the Sequential Approach and the assessment criteria of the RPG, GDA Retail Strategy and County Retail Strategy; and
- iii. **Maynooth:** has a constrained town centre that limits any further major retail development. The only locations that have potential are the Harbour Action Area Plan area and the backlands at Doctors Lane. Both of these areas are limited in extent and could be constrained by the town centre's capacity for any additional traffic generation. For the town to further grow its retail offer and importance out of centre locations will need to be identified. However, given that the key location for new mainstream comparison floorspace in North East Kildare over the period of the County Retail Strategy and beyond will be the Collinstown Level 2 Major Town Centre then Maynooth will require to redefine its role in the area. The scope for this is in redressing the deficiencies in modern format retail warehousing in the North East Sub Area of the County. In addition, the needs of Maynooth's existing and expanding residential areas must be met through further retail provision.

It is the policy of the Council:

- **RP 17** *To encourage the development of the retail and service role of Celbridge, Kilcock and Maynooth as self sustaining main centres in the Metropolitan Area of the County and GDA.*
- **RP 18** *To promote and progress the delivery of the integrated expansion of Celbridge Town Centre on the Donaghcumper lands and town centre consolidation through the re-use and regeneration of backlands and other key lands and buildings around the town centre.*
- **RP 19** *To encourage and facilitate the regeneration of land and buildings in the Kilcock Core Retail Area and other Town Centre zoned lands and the introduction of retail warehousing on the zoned lands to the north west of the town.*
- **RP 20** *To secure the continued consolidation of Maynooth Town Centre through the progressing implementation of the Harbour Action Area Plan objectives and the regeneration of backland areas in the town centre.*
- **RP 21** *To identify out of centre locations for retail development to enable Maynooth to sustain its role and importance in the County's shopping patterns, with a particular emphasis on the bulky goods sector to enable deficiencies in North East Kildare to be redressed.*
- **RP 22** *To investigate the need for any additional retail provision as appropriate within existing and expanding residential areas in future Local Area Plans.*

9.5.5 Hinterland Area: Sub County Town Centres – Athy, Clane & Kildare

Athy and Kildare Town were designated in the 2005 Strategy as Hinterland Area Tier 1 Level 3 Sub County Town Centres in the County Retail Hierarchy and this was adopted in the County Development Plan 2005 – 2011. In recognition of the growth in Clane's population and retail floorspace, its further potential and the strategic spatial deficiency in main centres in the north of the Central Sub Area of the County, Clane has been elevated from a Tier 2 Level 3 Hinterland Area Town Centre to a Tier 1 Level 3 Sub County Town Centre in the GDA and County retail hierarchies. Sub County Town Centres in the Hinterland Area of the County should play an important strategic role in the shopping patterns of their generally extensive hinterlands, particularly but not exclusively in respect of main food shopping. The health check/retail potential assessments of each in the County Retail Strategy have identified deficiencies in the offers of all three Sub County Town Centres, which is undermining them delivering their strategic role and potential. It is an important priority that, over the timescale of the County Retail Strategy and beyond, these centres all fully develop into their designated roles in the County Retail Hierarchy. Reflecting the different characteristics and potential of each, what is required and how this is achieved differs across the three Sub County Town Centres as follows:

- i. **Athy:** although there is strong market interest in new retail and mixed use town centre developments and edge of and out of centre schemes, as evidenced by those granted or in the pipeline, in terms of new retail floorspace the town has seen only the introduction of Lidl since the 2001 GDA Retail Strategy was prepared. As a consequence, Athy and its catchment area continue to have significant outflows of both convenience and comparison spend with, outside of Kildare, Carlow Town being a key destination for shoppers in the south of the County. The issues and potential of the Sub County Town Centre have been examined in detail in a retail study committed to in the 2006 Athy Town Development Plan and the strategic response required set out in the 2008 Athy Town Retail Strategy. The strategy provides the framework for the sustainable major enhancement of the town's convenience and comparison floorspace, with the key priority being on the delivery of new development within the heart of the town centre. It has not been incorporated as a variation to the Development Plan but is the framework document used to inform retail strategy and decision making on retail applications in the Sub County Town;

- ii. **Clane:** is very much in the early stages of its progression from a Hinterland Area Tier 2 Level 3 Town Centre into a Tier 1 Level 3 Sub County Town Centre, as reflected in its population size, nature and quantum of retail floorspace and the characteristics/profile of its supporting commercial, civic and community floorspace and functions when compared to either Athy or Kildare Towns. As such, although Clane has witnessed nearly a fivefold increase in its retail floorspace from 728m² at 2001 to 3,590m² by 2009, it does not have a strong main food shopping offer and still has a very limited comparison shopping profile, both in terms of quantum and quality when set against other Sub County Town Centres in the wider GDA and County. As with Athy, the priority is providing the framework for consolidation and growth through a focus in the first instance on town centre sites either backland or infill sites. However, it is recognised that as this is a village that has grown rapidly then there is limited scope for any substantial expansion of retail floorspace within and adjoining Clane's designated Core Retail Area. As a consequence, sites that have strong connectivity/linkage to the town centre to facilitate this need to be identified, noting that the 2009 Clane Local Area Plan has recently been adopted. In addition, the daily shopping and non retail services needs of the town's existing and expanding residential areas require to be better provided for to ensure that these communities have a heart and focus; and
- iii. **Kildare Town:** has emerged from being the seventh to fourth largest retail centre in the County. This is largely as a result of the quantum and quality of the KVOC as there has been limited new mainstream convenience and comparison development within or on the edge of the designated Core Retail Area. The former is very important in the profile, attraction and competitiveness of Kildare Town and the wider County but needs to be addressed separately to that of the town fulfilling its role as a Tier 1 Level 3 Sub County Town Centre in the County Retail Hierarchy. The Sub County Town, although there has been considerable market interest, still has not established itself as a main food or comparison shopping centre within the GDA or County shopping patterns. The priority is that this is achieved from the town centre outwards over the period of the County Retail Strategy and beyond with key locations identified as being the Action Area Plan 3 area, lands to the north of the KVOC and the Magee Barracks Site. The delivery of these locations/sites is integral to the sustainable consolidation, enhancement and regeneration of Kildare Town Centre and the enabling of its east – west sequential expansion. Proposals that potentially could undermine this objective being achieved will be resisted, which is in accordance with the tests of the Sequential Approach and other assessment criteria in the County Retail Strategy. It is, however, recognised that in parallel to strategic provision then the needs of the town's existing and expanding residential areas will require to be better met through a network of neighbourhood and local centres, which require to be designated in the programmed review of the Local Area Plan. The nature and scale of these will be consistent with the town centre focus in the town's retail strategy. Although there has been market interest in new retail warehousing floorspace in the town, given the market saturation of this sector of the retail market in this part of the County's Central Sub Area, it is not envisaged that this will form part of the retail strategy for the town for the foreseeable future but it is a position which requires to be monitored; and
- iv. The **KVOC:** has emerged as an important part of the profile, attraction and competitiveness of the County and Kildare Town in national and regional shopping patterns, but lesser so in those at the County level. For the centre to sustain and enhance its attraction, it is recognised that it requires to grow of the order of two to threefold, in line with the critical mass of FOC floorspace delivered in the two main competing centres in Northern Ireland. Any expansion will require to be restricted to the selling of designer brand seconds or surplus stock and, as with all large retail developments, will have to meet the tests of the RPG, 2008 GDA Retail Strategy and this County Retail Strategy's assessment criteria, particularly in respect of retail and cumulative impact. Additionally, there requires to be a focus on how any expansion of the KVOC: **locally** achieves real linkage and synergy with Kildare Town Centre as this is recognised as not having been achieved to date; and, at a more **strategic** level forms part of the overall retail and leisure attraction of the Central Sub Area of the County's main centres, specifically Naas and Newbridge. The foundation of the latter is

identified as being based on an integrated marketing strategy that will be required to form part of any planning application for the centre's expansion to ensure that issues in respect of retail and cumulative impact are fully addressed.

It is the policy of the Council:

- **RP 23** *To promote and encourage major enhancement and expansion of the retail offer and town centre functions of Athy, Clane and Kildare Town to sustain and enhance their importance as Sub County Town Centres within the Central and South Sub Areas of the County.*
- **RP 24** *To work with Athy Town Council in delivering the policy objectives of the County Retail Strategy in order that it delivers its vision and potential as the mechanism for redressing high shopping expenditure leakage from its catchment area and the south of the County as a whole.*
- **RP 25** *To progress the redevelopment/regeneration of town centre sites and identify appropriate edge of centre locations for the expansion of Clane's main food and comparison offer.*
- **RP 26** *To confirm in the emerging Kildare Town Local Area Plan the priority of key town and edge of centre sites as the locations for the consolidation and expansion of the retail and town centre functions of Kildare Town Centre and the inappropriateness of out of centre locations for new main convenience and mainstream comparison floorspace.*
- **RP 27** *To encourage and facilitate the expansion of the KVOC, in accordance with the guidance in the Retail Planning Guidelines and achieve greater linkage and commercial synergy with Kildare Town Centre in particular as well as the offers and attractions of Naas and Newbridge.*
- **RP 28** *To investigate the need for any additional retail provision as appropriate within existing and expanding residential areas in future Development Plans/LAPs during the period of this Retail Strategy.*
- **RP 29** *To identify and zone suitable locations for retail warehouse development in Kildare Town in the emerging Local Area Plan.*

9.5.6 Hinterland Area: Town Centres – Kilcullen, Monasterevin & Sallins

Kilcullen, Sallins and Monasterevin's retail development potential is closely linked with their roles within the County's designated Primary and Secondary Dynamic Clusters and proximity to the higher order centres of Naas, Newbridge and Kildare Town respectively. This limits the scope for these centres to grow into Hinterland Area Tier 1 Level 3 Sub County Town Centres and has detracted from their potential to developing into more self sustaining Tier 2 Level 3 Town Centres in the County Retail Hierarchy. All grew to have populations of the order of 3,000 – 4,000 between 1996 – 2006 but overall their retail and non retail services floorspace has not kept pace with the needs of the centres and their catchment areas. It is an objective that this position is addressed over the period of the County Retail Strategy and beyond by the following approaches to each:

- i. **Kilcullen:** requires a substantial enhancement in its convenience offer and a regeneration of key lands and buildings within the town centre, with the Mart Site being a particular priority and in accordance with the Local Area Plan based on a vision led masterplan. In parallel, there is a need to ensure that the local needs of its existing and growing residential areas are better met through neighbourhood and local centres. Additionally, developing its town centre attraction requires to harness the asset of its rich built and natural heritage and tourism potential;
- ii. **Monasterevin:** the unique streetscape and environment of the town centre limits its potential for

any major new retail development and if retail needs are to be better met out of centre locations in existing and growing residential areas require to be designated. The town's tourism potential is recognised and has considerable scope to be further built on through promoting and establishing the town centre as a niche speciality shopping and tourist destination that builds on the asset of its heritage, townscape, waterways, festival and famous associations; and

- iii. **Sallins:** has grown to being a town of 3,806 at 2006 and this growth is projected to continue driven by the asset of the railway station and proximity/accessibility to Naas and the Dublin conurbation. Although there have been a number of important additions to its retail and town centre floorspace, matching main food and comparison shopping needs with population growth have not met the expectations of the 2005 Strategy. The critical mass of floorspace needs to be increased to deliver the consolidation of the town centre and reduce the reliance on Naas in meeting the majority of these needs. There are a number of key sites that provide the framework for this to be achieved, including the Odlum's depot, the former meat factory, GAA grounds and pitch and putt lands. Progressing the mixed use regeneration of these is a priority over the period of the County Retail Strategy and beyond. In parallel, there is a need to ensure that the daily needs of existing and expanding residential areas are better met within the retail hierarchy of the town. Additionally, the profile and identity of Sallins requires to be developed through the promotion of the town's location on the Grand Canal.

It is the policy of the Council:

- **RP 30** *To encourage the growth and development of retail and other town centre services/functions in Kilcullen, Monasterevin and Sallins to enable them to grow into more self sustaining towns in the County's settlement and retail hierarchies.*
- **RP 31** *To investigate the need for any additional retail provision as appropriate within existing and expanding residential areas in future Local Area Plans.*
- **RP 32** *To consolidate and expand Kilcullen, Monasterevin and Sallins town centres through mixed use retail-led regeneration.*
- **RP 33** *To develop and build on the tourism potential of Kilcullen and Monasterevin's heritage and natural environments and that of Sallins' location on the Grand Canal as part of an integrated strategy for raising their profiles and identities.*

9.5.7 Metropolitan Area: Village Centre – Straffan

Straffan remains the only designated Metropolitan Area Level 4 Village Centre in the County Retail Hierarchy. It is a village that, in view of its structure, lack of village centre or edge of centre opportunities and limited residential development potential, will only witness limited growth in its retail and non retail services offer over the timescale of the County Retail Strategy and beyond. Any enhancement will generally be through infill development and the re-use and regeneration of land and buildings, with quality of design and respect for the character of the village being key requirements. The priority will be in ensuring that Straffan's quality of life is sustained and the village retains its attraction for living in and visiting. Additionally, Straffan has scope and potential to improve its tourism profile, which is largely generated from its close association with the *K Club*.

It is the policy of the Council:

- **RP 34** *To monitor the sustainability of local shopping and services provision in Straffan and encourage applications for retail and tourism related development that serve to consolidate and enhance the quality of the Village Centre.*

9.5.8 Hinterland Area: Small Town Centres

At Level 4 in the Hinterland Area of Kildare, there are a number of centres that have a range of shopping, non retail services and to differing degrees civic and community functions which render them Small Town Centres in the County context. They are designated as Tier 1 Level 4 Small Town Centres in the County Retail Hierarchy and are **Castledermot**, **Prosperous** and **Rathangan**. These centres all experienced population growth between 1996 – 2006, with that in Prosperous and Rathangan being significant and Castledermot recovering from modest population decline over the period 1996 – 2002. However, there has not been a parallel increase in shops and services to meet the needs of their growing populations or that of their rural hinterlands. This requires to be redressed, particularly in respect of convenience shopping, over the period of the County Retail Strategy through progressing the following in each:

- i. **Castledermot:** at a time when the town's population has increased, there has been a considerable deterioration in the town centre through increased retail and other commercial vacancies and the quality of the environment. There requires to be a regeneration strategy which seeks consolidation and environmental enhancement through the re-use and regeneration of land and buildings on the town centre's main streets and on the backlands to these streets so that Castledermot's vitality and viability is returned following the removal of heavy congestion with the extension of the M9;
- ii. **Prosperous:** is a tidy and pleasant small town centre but one that is not integrated with the old and new parts of Main Street being distinctly separate. The priority must be to enhance connectivity through the retail-led consolidation of the town centre. In addition, as at the time of the 2005 Strategy, the needs of Prosperous' expanding residential areas require to be better met through a mix of neighbourhood facilities and corner shops but these should not be of a scale or nature to undermine the attraction and potential of the town centre; and
- iii. **Rathangan:** still retains the considerable potential for its town centre to be expanded through the regeneration/redevelopment of former mill buildings and associated lands, which are the priority for new retail and other town centre development. To ensure this objective is achieved, out of centre retail development pressures should be resisted. This is a town with substantial tourism potential which provides scope for retail expansion which should be encouraged.

It is the policy of the Council:

- **RP 35** *To facilitate and encourage the provision of shops and services to consolidate and strengthen the role of Tier 1 Level 4 Small Town Centres in meeting the needs of their existing and expanding populations and those of their rural hinterlands.*
- **RP 36** *To respond positively to applications for retail and other town centre developments in Castledermot, Prosperous and Rathangan where they serve to consolidate the town centres and respect and enhance the existing built fabric.*

9.5.9 Hinterland Area: Village Centres

The importance of key Tier 2 Level 4 Hinterland Area Village Centres in the County Settlement Hierarchy and ensuring their proper planning and sustainable development is recognised in the Council's programme of existing and emerging LAPs and Village Plans. As recognised in the 2005 Strategy, such centres play an important part in rural community life within the County and wider country. By reason of their size, and the increasing influence of larger centres in the settlement and retail hierarchies, they serve on the whole smaller catchment areas and have a more limited range and quality of retail and non retail services floorspace than Tier 1 Level 4 Small Town Centres. The designated Tier 2 Level 4 Village Centres in the County Retail Hierarchy are **Allenwood**, **Athgarvan**, the grouping of **Ballitore/Crookstown/Moone/Timolin**, **Ballymore-Eustace**, **Derrinturn**, **Johnstown**, **Kill** and **Kilteel**.

In the period since the 2005 Strategy was prepared, as identified in the health checks of the different centres in the County Retail Strategy, the performance and potential of each centre at this level in the County Retail Hierarchy varies. The strategic retail planning framework for the majority of these centres over the timescale of the County Retail Strategy is to secure the realisation of the consolidation of the centres through the re-use and regeneration of existing lands and buildings.

It is the policy of the Council:

- **RP 37** *To facilitate the local provision of shops and services in Tier 2 Level 4 Village Centres to meet the needs of existing and expanding populations.*
- **RP 38** *To positively respond to and encourage applications for small retail developments in designated Village Centres, particularly those that will facilitate the re-use and regeneration of existing land and buildings, in the interests of consolidating and reinforcing the traditional heart of the centres.*

9.6 General Retail Policies

In addition to specific policies, a number of general policies are defined to shape retailing in the County over the period of the County Retail Strategy and beyond. These respond to particular influences and issues that prevail or have emerged since the 2005 Strategy was prepared. However, many reflecting their general nature replicate and reinforce the policies of the 2005 Strategy, as incorporated into the County Development Plan. This noted, the policies are summarised in the paragraphs below.

9.6.1 Corner Shops & Smaller Villages/Crossroads

Although there has been a continuing decline in the number of local shops around the more rural parts of the County and country in recent years, their role and importance in the life of the community is recognised as very important. In addition to meeting the basic day to day shopping needs of local people, with primary schools and other community facilities such as churches, village halls and sports grounds, they form the hub of interaction and community dynamics. Their retention and any potential for further enhancement along with other local services is thus very important. In respect of their further enhancement, given the increased trend for consolidation and expansion of new retail floorspace and local services in larger centres, it is unlikely there will be very much market interest in any new stores or non retail services floorspace in the County's smaller settlements. Where this does emerge, it will be encouraged subject to proposals:

- i. Respecting the level of the centre in the County Retail Hierarchy;
- ii. Being associated with the agricultural, rural and tourism sectors of the economy; and
- iii. Meeting the tests of the County Retail Strategy's assessment criteria.

It is the policy of the Council:

- **GR 1** *To retain, encourage and facilitate the retail role of Corner Shops and Small Villages around the County.*
- **GR 2** *To encourage and facilitate the preservation of retail and other services within established rural centres.*

9.6.2 Enhancement of Towns & Villages

The County has experienced a substantial increase in its total population and overall that of its main town and village centres over the period 1996 – 2006, noting that the impetus for this had been growing previously. This has largely been driven by:

- i. The proximity of the County to Dublin City Centre and its location on the edge of the capital's conurbation;
- ii. The continuing significant enhancements to strategic road and rail infrastructure which have enhanced accessibility to the National Gateway;
- iii. Continuing improvements to bus and rail services provision to the conurbation and other centres; and
- iv. Land shortage and house prices in the conurbation. A very different economic baseline prevails today but recovery is projected to kick in during or post 2010.

Previous performance and forecast outlooks should not, however, be the only drivers of where the County sits in respect of its attraction and competitiveness. Critical factors, in addition to strategic accessibility, housing availability and land prices, in ensuring the County sustains its attraction and competitiveness as a place people want to live, work, invest in and visit is the attraction and quality of its centres. Key in this equation is the quality of the public realm and the design of new developments. Progress on improvements to the public realm has been achieved to differing degrees and the quality of design of new developments has been a key criterion in the assessment of proposals. This progress and approach requires to be maintained and pursued over the period of the County Retail Strategy and beyond if the County and its towns and villages are to remain key attractors for living, working and investing in across all sectors of the economy.

It is the policy of the Council:

- **GR 3** *To encourage and facilitate the enhancement and environmental improvement of the County's towns and villages.*
- **GR 4** *To pursue all avenues of funding to secure resources for the enhancement, renewal and regeneration of the public realm of the County's towns and villages.*
- **GR 5** *To ensure that the best quality of design is achieved for all new retail development and that design respects and enhances the specific characteristics of the different towns and villages in the County.*

9.6.3 New District & Neighbourhood Centres

The County's population has increased 38.0% over the period 1996 – 2006, above that at the Mid East Region, GDA and State levels and is one of the highest growths in the country. At 2006, some 70.0% lived in the County's defined main centres with nine of these centres having populations at that time of over 4,000. Growth has been based on the rapid expansion of new residential areas in the County's towns and villages, which followed development/expansion trends of the previous twenty to thirty years. It was identified in the 2005 Strategy that in a number of cases, particularly but not exclusively the County's Level 2 County Town Centres and Level 3 Town and Sub County Town Centres, the existing retail floorspace in these centres could no longer meet the needs of their increased populations. In response, in accordance with the RPG, it was recognised that provision should be made for new District and Neighbourhood Centres in existing and expanding residential areas to ensure that needs were met in a more efficient, equitable and sustainable way. This position remains the case today and thus the County Retail Strategy, consistent with the 2008 GDA Retail Strategy, reinforces the requirement and provides the policy

framework for needs to be better met in these existing and growing areas of population through the zoning of lands for retail provision in Development Plans and LAPs, as appropriate to the different contexts of the County's main centres. Consistent with the definition of such centres in the RPG, the zonings will provide for a range of non retail services and community functions to be permissible.

Based on issues in respect of applications for District and Neighbourhood Centres in the County in recent years, it is important for clarity that the County Retail Strategy defines what these should comprise in both scale and nature and the locations where they are appropriate and should be permissible. This is summarised below.

- i. New District and Neighbourhood Centres will be on appropriately zoned lands in existing or expanding residential areas or as part of plan-led mixed use development strategies for the expanding suburbs of the County's main centres, such as Millennium Park in Naas. They will not be permissible in existing employment areas where more local level provision that meets the daily needs of workers and employers is deemed appropriate;
- ii. District Centres in the County context are defined as set down in the RPG. This differs considerably both quantitatively and qualitatively from what comprises Level 3 District Centres in the GDA Retail Hierarchy, which form some of the most important centres in the Dublin Region. District Centres, and only a limited number; will only be appropriate in the County's Level 2 and Level 3 Town Centres and Tier 1 Level 3 Sub County Town Centres. What is appropriate will be defined in Development Plans/LAPs;
- iii. New District and Neighbourhood Centres should complement rather than compete with town centres. In accordance with the RPG definition, the predominant retail role of District Centres should be main food convenience shopping supported by a mix of local, civic, community and non retail services and a limited quantum of comparison shopping, which should be lower order in nature. This principle applies to the commercial leisure component of proposals (such as hotels, public houses, restaurants and cinemas) with the priority for such uses being town centre locations;
- iv. The size of District Centres should comply with the guidance provided in the RPG and 2008 GDA Retail Strategy. The RPG advise that District Centres around the country outside of the Dublin area are likely to comprise 10,000m² net retail floorspace, as confirmed in the Regional Retail Strategy. This guidance threshold excludes non retail services, civic, community and commercial leisure uses. However, with the exception of Kildare's two Level 2 County Town Centres of Naas and Newbridge, District Centres in the County will be smaller than the RPG indicative threshold. This reflects the current size of the retail floorspace in the County's Level 3 centres and the need to ensure that any District Centre does not emerge as an alternative to the traditional heart of these centres. What is the appropriate size will differ across the different Level 3 centres in the County Retail Hierarchy and be determined by the control of the tests of the County Retail Strategy assessment criteria, as well as those of the RPG and 2008 GDA Retail Strategy; and
- v. Unlike their approach to District Centres, the RPG do not set down an indicative threshold for Neighbourhood Centres. They will be of a more limited size and function, in accordance with national and regional retail guidance. Neighbourhood Centres will typically be anchored by a small supermarket – be that a mainstream, symbol group, discounter or independent operator – and have a small range of local non services, civic, community and commercial leisure floorspace.

It is the policy of the Council:

- **GR 6** *To investigate the need for any additional retail provision as appropriate within existing and expanding residential areas in future Development Plans and Local Area Plans during the period of this Retail Strategy, while having regard to the possible impact on town centres.*

9.6.4 Retail Warehouse Parks

There has been increasing pressure on the Council in recent years for alternative forms of retailing to bulky goods shopping to be permissible in retail parks, specifically main food and discount convenience and mainstream comparison floorspace. To protect the vitality and viability of the County's town centres and avoid retail parks emerging as out of town shopping centres, this pressure has been resisted by the Council. This responds to evidence noted in the RPG that planned retail parks do not have any material impact on town centres provided that the range of goods sold is limited to truly bulky goods or goods generally sold in bulk. To remove the potential for any adverse impact on town centres, the Council will continue to restrict by condition the range of goods sold in retail parks to the sale of bulky goods alone. In accordance with the RPG, if there are or have been a number of retail park applications over a period of three years in the same area then the Council will require applicants to provide an assessment of the cumulative impact of more than one retail park proposal.

It is the policy of the Council:

- **GR 7** *To prohibit mainstream and discount convenience retail developments in retail parks.*
- **GR 8** *To prohibit mainstream comparison retail development or retailers on retail parks.*

9.6.5 Retail Development in Business Parks & Employment Areas

The days of single use large employment areas, be they business parks or industrial parks and estates, have been superseded by more mixed use sustainable development models that combine working, living, leisure and shopping and local services provision. These are often called Fourth Generation Business Parks with Millennium Park in Naas being an example, with other models including Sandyford and Cherrywood in Dun Laoghaire-Rathdown. In addition to being a more sustainable development strategy for major strategic greenfield (Millennium Park) and brownfield (Sandyford) locations, the introduction of local shopping and services provision is an important ingredient in the attraction to and competitiveness of such areas as locations for new residents, employers, workers and investors. Within the context of the wider strategy for District, Neighbourhood and Local Centres in the suburbs of the County's main centres provision for convenience shopping and local services will be made. In respect of older employment areas, retail provision will be limited unless it directly interfaces with existing and expanding residential areas and forms part of a strategic approach to the provision of appropriate retail facilities in the suburbs of the County's main centres. Any further retail floorspace in employment areas will be restricted to the wholesale sector.

It is the policy of the Council:

- **GR 9** *To ensure that the level of retail and local services provision in existing and new major employment areas sustains and enhances their attraction as locations for investment.*
- **GR 10** *To provide the land use and retail planning framework to ensure that the mixed use strategies for new employment areas respond to the wider context of need and demand in nearby expanding residential areas and individual main centres in the interests of ensuring that these locations are attractive to new residents, workers and employers.*
- **GR 11** *To limit the level of shopping and local services provision in existing industrial estates or parks. Standalone mainstream or discount convenience or comparison floorspace will not be permitted in existing employment areas unless it is proven to be part of the wholesale retail market sector.*

9.6.6 Re-Use & Regeneration of Derelict & Underutilised Land & Buildings

Re-use and regeneration of derelict/obsolete/underutilised land and buildings in town and village centres is a sustainable and desirable objective. Its importance is highlighted in the GDA Retail Strategy's Council Specific Policy Recommendation for Kildare (Page 77) in respect of Newbridge and Kilcullen, but is equally applicable across the County's main centres. This recommendation is:

'to encourage the regeneration of land and buildings in the town centres to provide opportunities for further mixed use developments; and to enhance the vibrancy of the town centres.'

In the context of the County, regeneration and renewal are particularly important in town and village centres as they will help achieve preservation and restoration 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 or underutilised sites in town centre locations should be promoted in the formulation of retail and mixed use development proposals. It is recognised that this poses challenges, particularly in backland areas of town centres but these are not insurmountable, as evidenced by the Corban's Lane/Naas Shopping Centre and Whitewater Shopping Centre schemes. Only where suitable, available and viable land and buildings cannot be found should alternative options be considered.

It is recognised that in an underperforming economy and retail market there will be pressure for development on less complex sites in edge and out of centre locations, with job creation being a key attractor/selling points. Although persuasive at this current time, in the interests of delivering longer term objectives for the heart of the County's towns and village centres, such proposals should be resisted subject to squarely meeting the tests of the County Retail Strategy's assessment criteria for retail development.

It is the policy of the Council:

- **GR 12** *To identify obsolete and potential renewal areas and to encourage and facilitate the re-use and regeneration of derelict land and buildings in the County's main towns and villages. The Council will use its statutory powers, where appropriate, to facilitate this and consider such buildings and lands for inclusion in the Register of Derelict Sites.*
- **GR 13** *To work with landowners and development interests to pursue the potential of suitable, available and viable land and buildings for retail and other town centre uses.*

9.6.7 Retailing in Tourism & Leisure

The County is rich in its tourism potential through its: natural assets, rivers and canals; built heritage; whether within towns and villages or in the countryside; its equine industry and internationally important racecourses; renowned recreational assets including parklands; golf courses and GAA profile and tradition; visitor attractions such as the Japanese Gardens and National Stud; excellence in its hospitality sector; and, more recently the introduction of the mass appeal of the KVOC. To date, the retail dimension of the County's tourism economy has not been harnessed. As this is of considerable importance to the wider Kildare economy, retail-related tourism requires to develop a greater critical mass and profile in the interests of the attraction and competitiveness of the County.

It is the policy of the Council:

- **GR 14** *To encourage and facilitate the development of retailing in the tourism and leisure sectors.*
- **GR 15** *To encourage and facilitate the delivery of tourism related retail developments and initiatives, subject to compliance with County Retail Strategy objectives and assessment*

criteria.

9.6.8 Casual Trading

The Council will carry out its statutory functions under the Casual Trading Act 1995, including the issuing of permits and the designation of Casual Trading areas where the Council considers these to be necessary.

It is the policy of the Council:

- **GR 16** *To prosecute in situations where the Casual Trading Act 1995 is being contravened.*
- **GR 17** *To take cognisance of the proper and sustainable development of the County's towns and villages, including the preservation and improvement of amenities, the safety and convenience of pedestrians, the traffic likely to be generated by Casual Trading and the promotion of tourism.*

9.6.9 Non Retail Uses in Core Retail Areas & Other Main Streets

While the retail offer and attraction of Kildare's main centres has witnessed a significant improvement over the last five to ten years, the parallel introduction of non retail and lower grade retail uses in Core Retail Areas and other main streets has changed the characteristics and ambience of these centres. Such uses include Amusement/Gaming Arcades, bookmakers, hot fastfood outlets, budget shops, charity shops, telephone/mobile shops and business and financial services. It is recognised that in the majority of the County's main centres the retail footprints do not meet the requirements of national and international operators and the space provides the opportunity for the introduction of alternative occupiers, often without application for a change of use being required. To maintain the integrity, critical mass of quality retail activity, vitality and viability of Core Retail Areas and other main streets, the Council will seek to discourage the introduction of such uses in prime retail areas.

It is the policy of the Council:

- **GR 18** *To refuse planning applications for Amusement/Gaming Arcades as they are considered to be an undesirable use and potentially detrimental to the business and commercial environment of the County.*
- **GR 19** *To discourage where possible within its statutory powers the introduction of non retail and lower grade retail uses in Core Retail Areas and other main streets in the interests of maintaining and sustaining the retail attraction of the County's centres.*

9.6.10 Innovation in the County's Retail Offer

As has been demonstrated in recent years, the retail sector is one of the most dynamic and competitive in the economy. To ensure that the County sustains and enhances its attraction and competitiveness as a retail destination, it must be proactive and responsive with regard to innovation in retailing and new retail market trends. The benefits of this approach are demonstrated in the success of the KVOC and its role in raising the retail profile of the County in national and regional shopping patterns. Retailing is a key part of Kildare's tourism offer and, as such, is important to the County's economy as a whole. Encouraging and facilitating innovation, be that in trading format, location or product, will assist the County to build on the success that has been established to date and, consequently its retail profile and attraction.

It is the policy of the Council:

- **GR 20** *To encourage and facilitate innovation in the County's retail offer and attraction.*

- **GR 21** *To review and monitor retail trends that could have an influence on the performance of the sector within Kildare and pursue the harnessing of new concepts and formats in the County's retail structure.*
- **GR 22** *To require that applicants for retail planning consents confirm their proposed hours of opening and 24 hour opening of shops will only be permitted where it can be clearly demonstrated that there will be no negative impact on the residential amenity of neighbouring areas.*

9.7 Criteria for Retail Development Proposals

In accordance with the RPG requirements, all applications for significant development should be assessed against a range of criteria. Reflecting the rural nature of Kildare, what is significant will vary around the County. As such, a lower threshold is set for when retail development proposals will be required to undergo such as assessment than those defined for Level 1 and 2 centres and Level 3 or other centres in the 2008 GDA Retail Strategy. In the County, as a general rule, developments in excess of 1,000m² (gross) of convenience floorspace and 2,000m² (gross) of comparison will be assessed by the criteria.

Where an application is made within existing defined Level 2 Major Town or County Town Centres it will not always be necessary to demonstrate the quantitative need for retail proposals in assessing such proposed developments. In setting out the retail impact, the focus should be on how the scheme will add/detract from the quality of the town centre in respect of improving the retail offer, urban design, integration with the built fabric and quality of life within the town/centre. However, this only applies to town centres and edge of centre or proposals not in compliance with the retail hierarchy should have a full assessment, specifically with regard to the tests of the Sequential Approach. This guidance is in accordance with that provided in the 2008 GDA Retail Strategy.

In making applications for retail development above the County Retail Strategy assessment criteria thresholds, applicants should also ensure that the proposal demonstrates compliance with the assessment criteria of both the RPG and the GDA Retail Strategy.

The County Retail Strategy assessment criteria are informed by those in the GDA Retail Strategy but are provided in checklist format. These will be considered in the assessment of large applications and include:

- i. Appraising the proposal against the tests of the Sequential Approach with all other options being considered. Under the Sequential Approach the following criteria require to be addressed:
 - If a brownfield town or village centre site is not being promoted in the application, it should be demonstrated that all town or village centre options have been fully evaluated and that flexibility has been adopted with regard to the retail format.
 - In all cases, the site should offer the optimum accessibility by all transport modes, including walking and cycling and this is generally best achieved within town or village centres;
- ii. There is demonstrable qualitative and quantitative need for the proposal and it is in accordance with the centre's role and level in the County Retail Hierarchy. With regard to quantitative need, this should be derived from the expenditure capacity within the relevant catchment area which should be appropriate to the nature and quantum of the retail floorspace proposed;
- iii. The impact on town and village centres, including cumulative impact. With regard to cumulative impact, due regard is taken of all extant planning permissions and consideration is given to proposals that are at an advanced stage in the planning process;
- iv. The baseline information and capacity/impact assessment is fit for purpose and transparent;

- v. The relationship of the application to any development plan allocations;
- vi. Its contribution to town/village centre improvement through quality of design and integration;
- vii. Its contribution to site and/or area regeneration;
- viii. Its role in sustaining rural communities;
- ix. The quality of access by all modes of transport and by foot and bicycle;
- x. Its role in improving the attraction and competitiveness of the County and Sub Areas of the County; and
- xi. The extent to which it is relevant to consider the imposition of restrictions on the nature and range of goods permitted for sale.

If the retail proposal, whether significant or not, is in compliance with Development Plan and LAP policies and proposals in all material respects, it should expect to be met 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 with the Development Plan/LAP. Where there is doubt on any aspect of a planning application, the Council will require a detailed justification related to the matter that is questionable.

- **GR 23** *All applications for large retail development will be assessed in accordance with the County Retail Strategy assessment criteria.*

9.8 RIS/RIA Guidance to Applicants

The Council wishes to ensure that retail proposals which accord with the relevant Development Plans and LAP and the County Retail Strategy proceed as expeditiously as possible through the planning process. To assist in achieving this, Appendix C of the County Retail Strategy provides guidance notes for applicants on what should comprise a Retail Impact Statement/Retail Impact Assessment (RIS/RIA) and what the outputs are.

9.9 Monitoring & Review

The GDA Retail Strategy will be fully reviewed in six years and a new strategy prepared. To ensure that the County Retail Strategy remains up to date and consistent with the Regional Retail Strategy, it is recommended that a review of the Strategy follows that of the GDA Retail Strategy.

During the life of the GDA Retail Strategy, it is proposed that interim update and review monitoring reports be produced at regular intervals no less than every second year to provide information on the delivery of the strategy, permissions granted and on possible changes to the population and economic assumptions used. The Council will participate in these updates and reviews and, if it deemed appropriate in view of the significance of any changes in the baseline information or trends, will review the County Retail Strategy or parts thereof.

APPENDIX A – GLOSSARY OF TERMS

A1.0 – GLOSSARY OF TERMS

Retail planning is a recognised specialist area of land use and policy planning and as it has evolved in Ireland and internationally so has the associated vocabulary. To assist the reading of this County Retail Strategy and the Manager's Report on the Pre-Draft Public Consultation Stage, which follows in Appendix B, this appendix provides a glossary of the terms and abbreviations used in the County Retail Strategy.

A1.1 Types of Retail Floorspace

A1.1.1 Total Mall Floorspace

Internal area (measured from inside walls) of a covered mall or shopping centre including gross retail area, floorspace devoted to incidental activities such as foodcourts or circulation space, entrance space, management/administrative offices, toilets, lifts and escalators.

A1.1.2 Net Lettable Retail Area

Total floorspace (measured from inside the shop walls) which is let to a retailer.

A1.1.3 Gross Retail Area

This is the net lettable area – i.e. sales space plus storage space, offices, toilets, canteen and circulation space.

A1.1.4 Net Retail Sales Area

The area of a shop or store which is devoted to the sales of retail goods (including the area devoted to checkouts). This is the area that forms the basis of capacity and retail impact assessments.

A1.2 Types of Retail Goods

A1.2.1 Convenience

This type of shopping includes:

- i. Food;
- ii. Alcoholic and non-alcoholic beverages;
- iii. Tobacco; and
- iv. Non-durable household goods.

A1.2.2 Comparison

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.

Comparison goods are often categorised by the terms higher, middle and lower order, which each have different turnovers per m². The different categories would be defined as follows:

- i. Higher order – generally comprises comparison goods sold in national and international department stores, designer brand stores, quality boutiques, niche furniture shops and speciality goods/premium homeware stores;
- ii. Middle order – includes national and high street footwear and fashion brands and more mass appeal department stores; and
- iii. Lower order – consists of lower value comparison goods and budget outlets.

A1.2.3 Bulky Goods

Goods generally sold from retail warehouses where Do-it-Yourself (DIY) goods or goods such as flatpack furniture are of such a size that they would normally be taken away by car and not manageable by customers travelling by foot, bicycle 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. White goods – fridges, freezers, TVs, music systems, computers and other electrical goods would generally come within this category.

A1.3 Types of Centre

A1.3.1 Town Centre

Under the RPG, the term 'town centre' is used to cover city, town, district or major village centres which provide a broad range of facilities and services and which fulfil a function as a focus for both community and public transport. It excludes retail parks, local centres and small parades of shops of purely local significance. Within the GDA, County and rest of the country, the importance of different town centres is defined in the framework of a retail hierarchy.

A1.3.2 Retail Centre & Retail Provision

The terms '*retail centre*' and '*retail provision*' have been adopted in the emerging County and Naas Town Development Plans to cover District, Neighbourhood and Local Centres in the County and Naas' retail hierarchies. The approach adopted reflects that it is the function of Development Plans and LAPs to determine the appropriate location and level of retail provision in the County's centres. Although the terms '*retail centre/retail provision*' have been adopted, it is recognised consistent with the RPG such centres have a wider range of functions than solely retail uses, including non retail services and community uses.

A1.3.3 District Centre

Either a traditional or purpose built group of shops, separate from the town centre and either located within the built up urban area or in a suburban location on the edge of an urban area, usually containing at least one food supermarket or superstore and non-retail services, such as banks, building societies and restaurants. In respect of new district centres, the RPG advise that they are likely to comprise about 10,000m² net in or adjacent to main town's outside of the Dublin area, with the Dublin area generally being taken to be the former Dublin County area.

A1.3.4 Local Centre or Neighbourhood Centre

Small group of shops typically comprising a newsagent, small supermarket/general grocery store, Sub Post

Office and other small shops of a local nature serving a small localised catchment population. The RPG provide no guidance on the size of such centres but indicate that they can be effectively anchored by a foodstore of up to 1,500m² gross. The 2008 GDA Retail Strategy extends this to the range 1,000m² – 2,500m² but does not state whether this is net or gross retail floorspace.

A1.4 Miscellaneous

A1.4.1 Catchment Area

The area from which most of the trade or expenditure turnover of a centre or store is derived. This can often be divided into primary, secondary and tertiary catchment areas.

A1.4.2 Assessment Criteria

The RPG require that one of the matters that should be included in Development Plans is the assessment criteria for retail developments. It is not appropriate that all developments should be tested against a Development Plan/County Retail Strategy's assessment criteria whether that be in view of location (they are at the heart of a town or large village centre) or size. In respect of the latter, a size threshold is set in the County Retail Strategy for when a retail development should be subject to the tests of the Strategy's assessment criteria.

A1.4.3 Sequential Approach

The definition of the Sequential Approach is provided in detail in this County Retail Strategy. Essentially, this sets that the preferred location for retail development should be within town centres. If there are no development sites available in a town centre then the next preference should be a location on the edge of the town centre. Only where there are no sites, or potential sites, within or on the edge of a town centre should out of centre development be contemplated.

A1.4.4 Expenditure

A1.4.4.1 Market Share

Is the proportion of retail expenditure by persons living in a catchment area that is spent and retained in the catchment area. It is generally higher for convenience than comparison goods expenditure. The expenditure which is not retained is defined as 'leakage'.

A1.4.4.2 Trade Draw

This is the term applied to expenditure which derives from people not living in a defined area that is spent on retail goods within the area. It is also referred to as 'inflow' and increases with the strength of an area or centre's attraction/importance, with the latter reflecting a centre's position in the retail hierarchy.

A1.4.5 Overprovision

The position reached when there is too much floorspace in a defined area or settlement against either the expenditure potential available or market demand overall or within a specific retail market sector.

A1.4.6 KVOG

Abbreviation of Kildare Village Outlet Centre, the Designer Outlet Centre or Factory Outlet Centre located at Kildare Town.

A1.4.7 FOC

Abbreviation of Factory Outlet Centre which is generally a group of shops, usually in an out of centre location, specialising in selling seconds and end of line goods at discounted prices. The growth in this niche retail sector over the last 15 – 20 years in Europe has been founded on FOCs being Designer Outlet Villages where the stock is seconds or end of line but are of high value designer labels rather than mainstream high street brands.

A1.4.8 Non Retail Services

These comprise a large range of uses including banks, building societies, post offices, auctioneers/estate agents, financial and business services, restaurants, sandwich shops, hot food take aways, dry cleaners, health and beauty, fitness clubs/studios and video shops.

A1.4.9 Discount Foodstore

Generally a single level, self service store normally but not always between 1,000m² – 1,500m² of gross floorspace selling a limited range of predominantly food and durable convenience goods at competitive prices, often with adjacent car parking.

A1.4.10 Urban Village

A mixed use new settlement for living, working and leisure with the creation of a community as per a traditional village or a small town being a key objective/vision. Can be a tool to regenerate brownfield sites in larger settlements or rural areas close to larger centres.

A1.4.11 GIS

Geographical Information System.

A1.4.12 Extant Planning Permissions

Are proposals that have full planning permission at the time a County Retail Strategy, a Retail Study or a Retail Impact Assessment/Retail Impact Statement (RIA/RIS) is being prepared. They are proposals that are not subject to appeal with the Board or have been granted on appeal by the Board.

A1.4.13 Retail Impact

Is the percentage reduction in turnover of a centre due to the trade diversion to a new retail development at the Design Year (the year at when full trading is assumed to have been achieved following the opening of a retail development or centre) against the trading performance/turnover of a centre at the Base Year. Different centres will have different levels of tolerance where the effects will or will not have an adverse effect on the vitality and viability of a centre.

A1.4.14 Cumulative Retail Impact

Assesses the combined retail impact of the proposal and any other extant retail permissions in the proposal's catchment area on centres in and adjacent to the catchment area.

A1.4.15 Base Year

The Base Year is the start year for the County Retail Strategy capacity assessment. In RIS/RIA, it is also taken to be the year of the planning application and the year against which retail impact and cumulative impact are calculated.

A1.4.16 Turnover Ratio

Is the annual turnover of net retail floorspace in any unit, either existing or proposed, and is expressed as €

per m². It is also determined at the County level in this County Retail Strategy as the average for both convenience and comparison floorspace and set against what the average level is for these types of floorspace across the GDA.

APPENDIX B – MANAGER’S REPORT ON SUBMISSIONS RECEIVED ON THE STRATEGY

PRE-DRAFT PUBLIC CONSULTATION STAGE – JULY 2009

B1.0 INTRODUCTION

This appendix provides the July 2009 Manager's Report on submissions received on in response to the invitation for submissions as part of the Pre-Draft Public Consultation Stage of the preparation of this County Retail Strategy.

B1.1 Legislative Background

In accord with the Department of the Environment, Heritage and Local Government's (DoEHLG) *Retail Planning Guidelines for Planning Authorities* (RPG), Kildare County Council (the Council) is required to prepare retail policies for its administrative area for incorporation in the County Development Plan. As planning authorities, Naas and Athy Town Councils also have to comply with this requirement in the preparation of their Town Development Plans. These guidelines are Ministerial guidelines under Section 28 of the 2000 Planning and Development Act. Section 28 provides that planning authorities shall have regard to Ministerial guidelines in the performance of their functions.

The RPG identify that a range of matters should be included in all future development plans for counties and cities. They advise that there will be a far greater requirement for detailed development plan policies in the more urban areas of the country and, as such, it will be necessary for the more urban counties to prepare comprehensive retail strategies and policies for their areas that address:

- 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 Retail 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*
- vi. *Identification of criteria for the assessment of retail developments.'*

These matters are listed under paragraph 36 of the RPG.

B1.2 Retail Planning Context

The RPG were published in December 2000 and revised in January 2005. Under the 2000 Guidelines, the 2001 – 2011 *Retail Planning Strategy for the Greater Dublin Area* (2001 GDA Retail Strategy) was prepared. This was taken due regard of in the preparation of the 2005 *Kildare Draft County Retail Strategy* (2005 Draft Retail Strategy) which informed the retail policies of the 2005 – 2011 *Kildare County Development Plan* (County Development Plan) and the 2005 – 2011 *Naas Town Development Plan* and 2006 – 2012 *Athy Town Development Plan*.

In July 2008, the 2008 – 2016 *Retail Strategy for the Greater Dublin Area* (2008 GDA Retail Strategy) was adopted. The 2005 Draft Strategy recommended that following a review and update of the Regional Retail Strategy then the County Retail Strategy should be reviewed to ensure it remains consistent with the GDA Retail Strategy. In addition, the County Development Plan is under review as part of the preparation of the 2011 – 2017 County Development Plan. Therefore, to ensure that the retail policies covering County Kildare (the County) remain up to date, a review and update of the 2005 Draft Retail Strategy is underway as part of the formulation of the 2008 – 2016 *Kildare County Retail Strategy* (the 2008 Retail Strategy), with the time period of the strategy being consistent with that of the 2008 GDA Retail Strategy.

B1.3 Consultation

In dealing with the matters set down under paragraph 36 of the RPG in the preparation of retail strategies, paragraph 37 of the guidelines states that planning authorities should take account of the views of retailers, shoppers, property owners and transport operators. The mechanism to achieve this that has been adopted by local authorities around the country is to invite written submissions on the preparation of the strategies from interested parties in adverts in local and national newspapers and also, in more recent years, local authority websites.

As part of the process of preparing the 2008 Retail Strategy, including the towns of Naas and Athy, the Council invited submissions from interested parties to assist in the preparation of the Retail Strategy. The Invitation for Written Submissions was advertised in the Leinster Leader, Kildare Nationalist and Irish Times and was also posted on the Council's website. To enable the submissions to be fully considered in the preparation of the Draft County Retail Strategy, the period for written submissions was early in the work programme of the Retail Strategy's preparation and covered the period 19 March to 15 April 2009.

B1.4 Purpose of Retail Strategy

The Invitation for Written Submissions highlighted that the purpose of the Retail Strategy is to guide the activities and policies for retail planning in County Kildare (the County) for the period 2008 – 2016. It stated that a Retail Strategy will aim to set out a co-ordinated, sustainable approach to the assessment and provision of retail facilities so that:

- i. Adequate and suitable provision is made to meet the needs of the population and provide for healthy competition and consumer choice;
- ii. Retail in suitable locations is provided; and
- iii. Significant overprovision is avoided.

The invitation also confirmed that the Retail Strategy would be prepared having regard to the 2008 – 2016 Retail Strategy for the Greater Dublin Area (2008 GDA Retail Strategy).

B1.5 Purpose of Report

This document is the Manager's Report on the Pre-Draft Public Consultation Stage of the preparation of the 2008 – 2016 Kildare County Retail Strategy. The purpose of this document is to report on the review of the submissions received prior to the preparation of the new County Retail Strategy and provide the County Manager's opinion on the issues raised. It has been informed by the review of the submissions by **Declan Brassil & Company Limited**, the consultancy appointed to prepare the new County Retail Strategy.

B1.6 Structure of Report

The structure of the report is set out as follows:

- **Section B2:** presents a referenced list of all the submissions received
- **Section B3:** summarises the key points in the submissions and provides the Manager's response to each
- **Section B4:** provides a glossary of terms.

B2.0 LIST OF SUBMISSIONS RECEIVED

16 submissions were received by the Council in response to the Invitation for Written Submissions to the Review and Update of the County Retail Strategy. Table B2.1 provides a list of the written submissions to the Pre-Draft Consultation Stage of the 2008 – 2016 County Retail Strategy and their unique reference number.

Table B2.1 List of Submissions

Number	Submission	Location/Topic
B3.1	Tesco Ireland on behalf of Tesco Ireland	No matters raised
B3.2	John Spain Associates on behalf of Ballymore Properties	Newbridge and Whitewater Shopping Centre
B3.3	John Spain Associates on behalf of Aldi Stores (Ireland) Ltd	Discount Stores
B3.4	Treasury Holdings on behalf of Treasury Holdings	Roseboro, Naas
B3.5	Treasury Holdings on behalf of Treasury Holdings and Castlekeel Ltd	Collinstown
B3.6	Brian Meehan & Associates on behalf of Baba Exports	Athgarvan
B3.7	Brian Meehan & Associates on behalf of Mr Tom Treacy	Monasterevin
B3.8	Brian Meehan & Associates on behalf of Mr Tom Treacy	Kildare Town
B3.9	Brian Meehan & Associates on behalf of Treacy Courtyard Developments Ltd	Newbridge
B3.10	Brian Meehan & Associates on behalf of Monaco Town Centre Developments and Leinster Mart Co-op	Kilcullen
B3.11	WK Nowlan & Associates on behalf of Magee Barracks Project Board	Kildare Town
B3.12	Development Planning Partnership on behalf of the Geraldine Partnership	Athy
B3.13	Glanbia Estates Ltd on behalf of Glanbia Estates Ltd	Monasterevin and Other Centres
B3.14	RGDATA on behalf of RGDATA	Strategic and General Issues
B3.15	Lidl Ireland GmbH on behalf of Lidl Ireland GmbH	Strategic and General Issues
B3.16	Alan O'Kelly of Naas Town Council	Naas

B3.0 SUBMISSIONS & RESPONSE

The purpose of this document is to report on the review of the submissions received prior to the preparation of the new County Retail Strategy.

This section of the report provides a summary of the key points made in each of the uniquely referenced submissions and the County Manager's response to the matters raised.

B3.1 Tesco Ireland Limited on behalf of Tesco Ireland Limited

B3.1.1 Submission

- Letter confirming permission for surveys in Tesco Maynooth, Newbridge and Naas.

B3.1.2 Manager's Response

The submission did not specifically raise any matters in respect of the review and update of the County Retail Strategy.

B3.2 Whitewater Shopping Centre – John Spain Associates on behalf of Ballymore Properties

B3.2.1 Submission

- The Strategy should ensure the role and function of Newbridge Town Centre and Whitewater Shopping Centre is not compromised by the consolidation and/or expansion of Kildare Village Outlet Centre (KVOC).
- Noted the GDA Retail Strategy states that given the expectation in the commercial sector, it is unlikely another centre will open in the near future until demand builds up and the format fully accepted by the shopping public.
- Requests Council ensures retail uses in KVOC adhere to original permission and that this is reflected through the inclusions of appropriate policies and objectives in the Strategy.
- Concern that the type of retail use being permitted does not meet conditions of planning permission and may directly compete with and impact upon the vitality and viability of Newbridge Town Centre. This is highlighted as being evidenced by the fact that many operators are in both KVOC and Whitewater Shopping Centre.
- Planning policy supports the protection of the vitality and viability of town centres and adherence to the County Retail Hierarchy. FOCs have a niche function which is not intended to interfere with or detract from the performance of town centre sites.
- The different levels Newbridge and Kildare Town are in County Retail Hierarchy. Specific request that higher order comparison retailing is directed to Major Town Centre sites.

B3.2.2 Manager's Response

Newbridge, with Naas, is a Level 2 County Town Centre in the 2008 GDA Retail Strategy and a Level 2 Twin County Town in the current County Retail Hierarchy. It is, therefore, one of the most important centres in both the GDA and the County and this position will be reinforced in the new County Retail Strategy. The Council recognises the important role that the Whitewater Shopping Centre has played in improving the middle and higher order comparison shopping offer of the County and its contribution to reducing the high levels of comparison expenditure leakage from the County. This is a position the Council will seek to sustain and enhance in the policies and proposals in the new Strategy.

In parallel, KVOC has also been an important new introduction to the GDA and County's retail landscape. It is the only Factory Outlet Centre (FOC) in the GDA and the only one in the State that has the characteristics and quality envisaged in the Department of the Environment, Heritage and Local

Government's (DoEHLG) *Retail Planning Guidelines for Planning Authorities* (RPG), as revised in 2005. In contrast, there are two large scale FOCs in Northern Ireland at Banbridge and Junction 1 at Antrim. It is recognised that these are attracting considerable trade from the south and this is understood to have increased particularly over the last year due to the dual effects of the strength of the euro against sterling and the 6.5% differential in VAT. It is understood that it is the intention that KVOC grows in size to obtain the critical mass generally found in FOCs and also to ensure the centre more effectively competes with the two FOCs in the north. It is noted that the GDA Retail Strategy Retail Market Review highlights in paragraph 4.48:

'It is the expectation in the commercial sector that it is unlikely another centre will open up in the near future until demand builds up and the format has been accepted by the shopping public.'

The GDA Retail Strategy does not preclude this happening, it only indicates that it would be *'unlikely'*. Additionally, the policy section (Section 6) of the GDA Retail Strategy does not preclude the introduction of another centre or the expansion of KVOC. It does advise that a detailed study would be required as part of any planning application for such a centre.

FOCs are recognised as having very different characteristics to town centres or new purpose built shopping centres in respect of the nature of their retail offer and the extent of their catchment area. Any planning application for an extension to KVOC will require to address the RPG, GDA and County Retail Strategy assessment criteria for large retail applications, including the assessment of any potential retail or cumulative impact. In addition, as is the case currently, planning conditions would be attached to any grant of permission to ensure that it retains its distinctness and, as such, reduces any potential retail impact on traditional town centres in the County.

It is the view of the Council that KVOC does have a very different offer and appeal to Whitewater Shopping Centre and is an important asset to the retail profile of the County. A key issue will be to ensure that its asset and attraction are maximised to the benefit of Kildare Town Centre and also other centres in the County, including Naas and Newbridge as it is recognised that this is not happening as effectively as could be achieved.

B3.3 John Spain Associates on behalf of Aldi Stores (Ireland) Ltd

B3.3.1 Submission

- Requests discount foodstore's important role in retail hierarchy should be acknowledged in the Strategy and a specific definition of this type of retail category be incorporated in the Strategy. It should also acknowledge that a discount foodstore can serve a neighbourhood catchment and can function as a neighbourhood shop.
- Strategy should specifically recognise the role that discount foodstores can make in the redevelopment of previous industrial locations which have now become obsolete. Identifies discount foodstores with or without retail warehousing have been permitted by An Bord Pleanála (the Board) and other local authorities on land zoned industrial – indicates that this should be the approach in Kildare.
- Indicates requests in accordance with RPG and GDA Retail Strategy.
- Proposes wording that suggests retail tests be applied to discount stores in excess of 1,700m² gross outside of designated local, neighbourhood, district or town centres. These tests are: justifying need; impact; sequential approach; and, of appropriate scale.
- Adoption/incorporation of the requests would facilitate the development of Aldi discount foodstores in the area in the future.

B3.3.2 Manager's Response

The Council recognises the important role of discount stores in the convenience market and shopping patterns and, as with the RPG, they can be an appropriate anchor of neighbourhood centres. It also welcomes the introduction of the format in the County in recent years and this will continue to be the case as long as any proposal accords with the policies of the County Retail Strategy and the policies and zonings of adopted Development Plans and Local Area Plans (LAP).

Although the RPG and GDA Retail Strategy do identify discount stores as a separate category of convenience shop, it has not been the approach adopted to date in retail planning in the County. Consideration of this type of store, along with other specific retail formats, is under the tests of the County Retail Strategy's assessment criteria when a proposal is above the criteria's thresholds. This responds to the fact that large parts of the County are predominantly rural and each application requires to be considered in the context of its catchment area.

The priority, in accord with the tests of the Sequential Approach, is that discount stores or any other retail proposal are located in existing centres and this will remain the policy of the Council. It would not be the policy of the Council to encourage the introduction of discount or other types of food store on previous industrial locations unless this forms part of a coherent mixed use regeneration strategy which delivers a new neighbourhood or district centre within an area with a large or expanding population that is poorly served in respect of shopping and services needs.

B3.4 Treasury Holdings – Lands at Roseboro, Naas on behalf of Treasury Holdings

B3.4.1 Submission

- Lands comprise 17ha located adjacent to the N7, to the north of the motorway and the Maudlin's Interchange.
- Identifies issues in respect of Naas' underperformance against Newbridge and the need to consolidate provision in Central Kildare.
- Highlights the improvement in the quality and quantum of convenience floorspace in Naas is unlikely to be able to be accommodated in Naas Town Centre but through combination of both neighbourhood and district centres. Quotes from the 2005 Draft Strategy to this end.
- Site potential analysis indicates site could provide a mix of uses, one of which is leisure and retail which supports other land uses on the site. States leisure and retail uses would be ancillary to other development and would primarily serve the local community. Retail development would, as such, be predominantly neighbourhood level of provision for the local population. Definition of what this may comprise is that for Neighbourhood/Small Town/Village Centre set out in 2008 GDA Retail Strategy.
- Not intended proposal would compete with Naas Town Centre or other established centres but would be part of a sustainable mixed use strategy for the development of the lands. It would however contribute to the sustainable growth of Naas and the provision of neighbourhood centres in accordance with the Draft Strategy's policies.

B3.4.2 Manager's Response

This proposal presents a considerable expansion of the Naas Urban Envelope and would be viewed as very much long term given sufficient land is zoned, both in the County and Naas Town Development Plans for retail development and the emphasis is on the built up area and its immediate fringes for both neighbourhood and district centres.

The description provided in the submission would appear to have the characteristics of an urban village and this has not been envisaged to date in the vision and strategy for Naas in respect of this particular location. Additionally, although the submission highlights Naas' underperformance against Newbridge and

that not all improvements to redress this could be accommodated in Naas Town Centre, the retail component of the mixed use strategy is more local in its ambition. This acknowledged, the potential will be examined as part of the review of the County and Town Development Plans.

B3.5 Collinstown – Treasury Holdings on behalf of Treasury Holdings & Castlekeel Ltd

B3.5.1 Submission

- Welcomes designation of Collinstown/Leixlip as the Level 2 Major Town Centre for North East Kildare to be developed over a 20 year timeframe and the support for this is in the County Development Plan.
- Requests above be reinforced in Strategy and County Development Plan through a specific policy objective. The policy objective should propose the net retail floorspace is in the range of 40,000m² – 60,000m² net to enable the appropriate critical mass and quality of offer to be provided.
- Headline analysis is provided on the high levels of mainstream and bulky goods comparison expenditure leakage from North East Kildare. Requests that this is specifically analysed in the Strategy as well as the potential for Collinstown, as a Major Town Centre, to redress this and contribute to inflows.
- Offer to provide market survey analysis tables.

It is noted that the market analysis identified was requested from and provided by Treasury Holdings.

B3.5.2 Manager's Response

Collinstown is the designated Metropolitan Area Level 2 Major Town Centre for North East Kildare in the County Retail Hierarchy/County Development Plan. This is reaffirmed as Leixlip (including Collinstown) in the 2008 GDA Retail Hierarchy. The objective, as highlighted in the submission, is to stem the significant levels of expenditure leakage – particularly comparison expenditure – from North East Kildare.

The Council is committed to progressing this policy objective and the land use planning framework for it to be achieved will be provided by the emerging Collinstown Local Area Plan (LAP). The Draft LAP is currently on display with 29 July 2009 being the closing date for submissions. It is, therefore, well advanced in the development plan process.

What is not recognised in the submission is the parallel designation in the GDA Retail Strategy of nearby Dunboyne in neighbouring Meath as growing into a new Metropolitan Area Level 2 Major Town Centre over a comparable timeframe as Collinstown. The market potential for both is an issue which is being examined in the Review and Update of the County Retail Strategy, notwithstanding the Council's commitment to the delivery of Collinstown.

B3.6 Lands at Athgarvan Cross, Athgarvan – Brian Meehan & Associates on behalf of Baba Exports

B3.6.1 Submission

- Highlights Athgarvan is a Level 5 Smaller Village Centre/Crossroads in the Draft County Retail Strategy, Subject Lands are within zoned designated Village Centre and benefit from a mixed use permission, including retail floorspace (325m²).
- Also highlights that the Draft Strategy recognises the integral role and importance of local shops in positively contributing to rural life and that this should be encouraged. Requests Strategy reiterates and reinforces this.
- Requests Strategy identifies Subject Lands are appropriate for the provision of local retail facilities in Athgarvan.

B3.6.2 Manager's Response

The new County Retail Strategy will reinforce the importance of local retail and services provision in Level 5 Smaller Village Centres and their contribution to rural life. Since the Draft Strategy was prepared, the 2007 Athgarvan LAP has been adopted and the granted proposal on the Subject Lands is in accord with the Plan. In view of the LAP, Athgarvan has been included in the list of centres in the health checks undertaken as part of the preparation of the review and update of the County Retail Strategy.

B3.7 Lands at Dublin Road, Monasterevin – Brian Meehan & Associates on behalf of Mr Tom Treacy

B3.7.1 Submission

- Highlights site benefits from mixed use planning consent that includes 1,835m² of retail floorspace in 7 units and the role of the proposal is to enhance Monasterevin's retail role and offer in order to respond to expenditure leakage and function/competitiveness of the town in the County Retail Strategy.
- Seeks Monasterevin's designation as a Level 3 Hinterland Area Sub County Town Centre in the GDA Retail Strategy is recognised in the Strategy.
- Recommends the Subject Lands are: identified as part of the Town Centre or Town Centre Expansion Area; sequentially the most suitable location for modern format convenience and comparison floorspace; and, the site be favoured over alternative out of town sites.
- Highlights the issues identified in the Draft Strategy in respect of Monasterevin Town Centre not having the scope and potential to meet the retail needs, specifically in respect of convenience floorspace, of its expanding population. Promotes that the Subject Lands have the potential to redress this on zoned town centre lands and that this should be recognised in the Strategy.

B3.7.2 Manager's Response

Monasterevin is part of the designated Kildare Town – Monasterevin Secondary Dynamic Cluster in the 2004 *Regional Planning Guidelines Greater Dublin Area* (RPGGDA). Given its significantly improved road and rail connectivity to the Dublin conurbation and Twin County Towns of Naas and Newbridge, the town has witnessed a significant increase in population but this has not been matched with commensurate levels of new retail or services floorspace to meet the needs of the town and its hinterland in a sustainable way. As highlighted in the submission, this was an issue identified in the 2005 Draft County Retail Strategy.

The new County Retail Strategy will reinforce the importance of redressing the above and respond to the increased area of lands zoned 'Town Centre' in amendments to the Monasterevin LAP. The Subject Lands are appropriately zoned and the planning permission is explicitly acknowledged in the town health check. The Strategy will reinforce the policy framework to confirm its appropriateness.

B3.8 Lands at Nurney Road, Kildare Town – Brian Meehan & Associates on behalf of Mr Tom Treacy

B3.8.1 Submission

- Submission is in respect of lands directly opposite the KVOC, adjacent to the N7/M7 Motorway Interchange. Lands are currently greenfield with a 'G2 – Office based Industry' zoning in the 2002 Kildare Town LAP.
- Indicates preliminary development proposals for the Subject Lands are:
 - Anchor convenience store
 - A number of comparison and non-retail services units
 - An element of bulky goods floorspace
- Highlights Draft County Retail Strategy recognises no opportunities in Core Retail Area to redress

the lack of larger modern format convenience floorspace in town and that subject lands are a 'Gateway Site' which is suitable for this and has synergy with the KVOC.

- Highlights 2002 LAP recognised need to expand Kildare Town's relatively small retail base but this has not occurred to any real degree since then and that the Subject Lands could contribute to resolving this, and, as such, should be zoned accordingly in the review and update of the LAP.

B3.8.2 Manager's Response

The priority in Kildare Town is to consolidate new retail development in the town centre and there are existing zoned lands and other key sites that will enable this to take place. This will be reinforced in the new Kildare Town LAP which currently in preparation. The Subject Site would be contrary to this principle and any proposal coming forward for the range of uses identified would not be viewed favourably by the Council. This site is recognised as an important strategic employment site and it is proposed to retain this as such for office based industry in the new LAP.

B3.9 Edward Street, Newbridge Town Centre – Brian Meehan & Associates on behalf of Treacy Courtyard Developments Ltd

B3.9.1 Submission

- Newbridge Town Centre should develop a retail offer to compete with the Major Town Centres in the GDA Metropolitan Area to stem the outflow of expenditure from the County.
- Continued provision of modern retail floorspace in Newbridge Town Centre should not be prejudiced by development remote from the Town Centre and that it is recommended that there is adequately zoned 'Town Centre' lands in Newbridge to cater for the majority of new convenience and comparison floorspace over the lifetime of the Strategy.
- Subject Lands constitute major town centre development opportunity in Newbridge and flexibility with regard to length of planning permissions and floorspace capacity should be specifically stated in County Retail Strategy to enable long term development of Newbridge as a Level 2 Centre in GDA Retail Hierarchy.
- Lands are located adjacent to Whitewater Shopping Centre and comprise some 16 acres. Indicates Council owned lands could be incorporated in any Masterplan for the area.

B3.9.2 Manager's Response

As has been highlighted, Newbridge, with Naas, is a Level 2 County Town Centre in the 2008 GDA Retail Hierarchy and a Level 2 Twin County Town in the current County Retail Hierarchy. It is, therefore, one of the most important centres in both the GDA and the County and this position will be reinforced in the new County Retail Strategy. Of key importance, in accord with the tests of the Sequential Approach, it is the priority of the Council that retail development is within and adjacent to the designated Core Retail Area. The Subject Lands are located in the heart of Newbridge Town Centre and, thus, wholly accord with this. Note is made of the potential for planned town centre expansion that incorporate Council owned lands.

B3.10 Kilcullen Mart Site – Brian Meehan & Associates on behalf of Monaco Town Centre Developments & Leinster Mart Co-op

B3.10.1 Submission

- Submission in respect of Leinster Mart Co-op site in Kilcullen Town Centre. Proposals to relocate the Mart and redevelop the site to include: anchor convenience store; range of high street comparison retail units; various non-retail services units; a discount foodstore; medical centre; office uses; and, civic and community uses on circa 4.4ha (10.72 acres) site.

- Seeks County Retail Strategy recognises lands most sequentially preferable town centre zoned lands in Kilcullen Town Centre for the location of modern format convenience and comparison retail floorspace and be favoured against other less sequentially preferable sites.
- Seeks that the County Retail Strategy acknowledges Kilcullen requires new modern retail floorspace in order to retain expenditure from its catchment and respond to the competitive retail market in the area, to enable Kilcullen to fulfil its role as part of the designated RPGGDA Naas/Newbridge/Kilcullen Primary Dynamic Cluster.

B3.10.2 Manager's Response

Kilcullen is an important part of the RPGGDA designated Naas/Newbridge/Kilcullen Primary Dynamic Cluster but has not to date witnessed the population growth or town centre development response to enable its contribution to be harnessed. This is largely as a result of the market and development focus on the two higher order Twin County Town Centres. Existing County Development Plan/Draft County Retail Strategy policies and zonings seek to redress this and the Subject Lands are an important part of this equation, accepting that they require to be compliant with the existing and emerging assessment criteria. Their central location and potential for regenerating and consolidating the heart of the town centre are well recognised by the Council.

B3.11 Magee Barracks – W.K. Nowlan & Associates on behalf of Magee Barracks Project Board

B3.11.1 Submission

- Seeks Magee Barracks site in Kildare Town be identified in the County Retail Strategy as suitable for a new supermarket anchored neighbourhood and/or district centre. The site comprises some 62 acres.
- Identified site is strategically significant for redevelopment in the context of the regeneration of Kildare Town Centre and the Kildare Town LAP recognises the process and that it can comprehensively address the deficiencies that currently prevail in convenience shopping and meeting the needs of the expanding residential population.
- The retail component would be part of a wider mixed use regeneration strategy for the site that would contribute to the wider 2005 LAP vision for the town.

B3.11.2 Manager's Response

This site in recent years was identified as a key location for affordable housing by the Affordable Homes Partnership (AHP) given that it was in State ownership. However, given the significant downturn in the economy and parallel effects on the housing market then the potential of the site is being re-evaluated. In recognition of the key facts of development economics then a more mixed use regeneration strategy for the site is emerging that could serve to provide the potential for the expansion of Kildare Town Centre, close to its defined Core Retail Area. This is being fully taken account of in the preparation of the Review and Update of the County Retail Strategy.

B3.12 Development Planning Partnership on behalf of the Geraldine Partnership – lands on Geraldine Road, Athy

B3.12.1 Submission

- Highlights lands were subject to a planning application for a district centre granted by Athy Town Council in July 2008 but refused on appeal by An Bord Pleanála (the Board) in February 2009. It identifies that key considerations of the Board were the 2008 Draft Athy Town Retail Strategy and its advice on the potential of the site and other issues. These were:
 - It would be more appropriate if it was neighbourhood centre in scale and nature
 - The traffic impact on the surrounding network

- In the light of the Board's decision, revised proposals for a reduced scale of development are emerging in consultation with the Council and Athy Town Council. It is submitted the revised proposals are in accordance with the Draft Town Retail Strategy and will contribute to its objectives being met.

B3.12.2 Manager's Response

The Council and Athy Town Council, in accord with the Draft Town Retail Strategy and the Board's decision, confirm that the emerging proposals for a reduced scale neighbourhood centre nature of development on the Subject Site is appropriate and this will be reflected in the new County Retail Strategy.

B3.13 Glanbia Estates Lands in Monasterevin and other centres the County – by Glanbia Estates Ltd

B3.13.1 Submission

- Highlights that Monasterevin should be promoted as a key local town and an attractive location for convenience and low order comparison shopping.
- Seeks endorsement of the RPG Sequential Approach principles in the County Retail Strategy and that preference should be given to sites with good accessibility, control of adjacent to primary residential areas and/or public transport nodes.
- Sets out the Sequential Approach principles of the RPG.
- Highlights Monasterevin's designation as a Level 3 Sub County Town Centre in the 2008 GDA Retail Strategy and the nature of retail floorspace that is likely to be appropriate in such centres.
- Identifies that the GDA Retail Strategy promotes that key local centres, such as Monasterevin, should continue to be supported as attractive locations for both convenience and comparison floorspace to meet the needs of their growing populations and rural hinterland.
- Submission identifies that Monasterevin has inadequate retail floorspace and restricted potential in the town centre to meet needs and as such edge of centre locations will require to be considered.
- Requests that meeting local needs in a sustainable way, in accordance with national and regional policies, should be reflected in the County Retail Strategy's guidance on the location of retail development. This should not exclude edge of centre locations in respect of a mix of services meeting the needs of the Community.

B3.13.2 Manager's Response

As has been highlighted, Monasterevin is part of the designated Kildare Town – Monasterevin Secondary Dynamic Cluster in the RPPGDA. Given its significantly improved road and rail connectivity to the Dublin conurbation and Twin County Towns of Naas and Newbridge, the town has witnessed a significant increase in population but this has not been matched with commensurate levels of new retail or services floorspace to meet the needs of the town and its hinterland in a sustainable way. This was an issue identified in the 2005 Draft County Retail Strategy.

The new County Retail Strategy will reinforce the importance of redressing the above and respond to the increased area of lands zoned 'Town Centre' in amendments to the Monasterevin LAP. However, under the tests of the Sequential Approach, edge of centre locations may be required to be looked at in addition to locations where there has been or planned to be a large increase in the resident population. In addition to the tests of the Sequential Approach, the appropriateness of a site will also depend on its zoning.

B3.14 Strategic & General Issues – raised by RGDATA

B3.14.1 Submission

- Highlights representation of independent family grocery sector and support for sustainable retail development vibrant centres and communities and a diversity of shops that people can walk to.
- Highlights the role of shopping provision in town centres and its contribution to their vitality and inability and the need for this to be focused in new investment in town centres combined with that in environmental improvements, transport infrastructure and town centre management.
- Requests:
 - Accurate survey of existing retail floorspace and the capacity potential for additional floorspace at a centre level based on needs and the retail landscape that prevails
 - Survey information – shopper, floorspace and footfall should be included in the Retail Strategy to provide a transparent view of the data that future needs are based. Identifies that data in respect of smaller centres has generally been ignored resulting in the complete picture not being presented
 - The Retail Strategy should ensure a fair and equitable distribution of retail floorspace in the County taking account of adjoining counties and national and regional retail policies in respect of second tier towns
 - A disproportionate quantum of floorspace should not be allocated to any individual town
 - Recognition be given to the need to sustain and build-up the retail base of smaller towns and villages
 - Convenience and comparison shopping be dealt with separately
 - Concerns raised in the RPG in respect of adherence to the size and distribution of retail floorspace
 - Concerns in respect of adherence to the principles set out in the 1997 'Sustainable Development – A Strategy for Ireland', particularly in respect of new inter-urban road infrastructure
 - The potential for urban renewal of significant shopping be recognised
 - Specifically requests clearer clarification in respect of food retailing of retail parks, given trends that have emerged
- Highlights RGDATA supports the principles of the RPG and asks that these be monitored in this consideration of planning applications.

B3.14.2 Manager's Response

The Council would confirm its support for:

- i. Sustaining and enhancing the independent family grocery sector and vibrant centres and communities where there is a diversity of shops that people can walk to; and
- ii. The importance of existing town centres as the priority location for new retail investment, in accord with the tests of the Sequential Approach.

B3.14.2.1 Surveys & Baseline Information

The 2005 Draft County Retail Strategy was founded on the comprehensive floorspace survey conducted as part of the preparation of the 2001 GDA Retail Strategy. The new County Retail Strategy is based on the floorspace information in the 2008 GDA Retail Strategy, updated with more recent information. This has been the approach adopted in the review and update of retail strategies around the country in view of the high cost of these surveys, given the more rigorous constraints on outsourcing work to private consultancies it is recognised to be the best information that is available. The RPG in Annex 3 indicate the potential for a comprehensive independent baseline being established through liaison between the

DoEHLG and the Central Statistics Office (CSO) but this has not materialised given the costs, and in the current economic climate is even less of a priority.

It would be noted that the number of centres included in the health checks/assessments of retail potential has been increased since the 2005 Draft Retail Strategy from 19 to 26, with one being a grouping of 4 centres (Ballitore/Crookstown/Moone/Timolin). This is a very extensive number of centres when compared to the approach generally adopted in County Retail Strategies and does ensure that the County's smaller centres are given due consideration in the framing of specific or general retail policies.

The preparation of the new County Retail Strategy has been informed by the following surveys:

- The 2008 GDA household and shopper surveys
- A supplementary **500** person household survey across the County conducted in June 2009
- On street shopper surveys in Maynooth (**100**), Naas (**200**) and Newbridge (**200**)
- The 2005 household and shopper surveys commissioned by Athy Town Council to inform the preparation of the 2006 Athy Town Development Plan.

The two types of survey – household and shopper – collect information on the shopping patterns of those who live in the County and those that shop in the County, be that Kildare residents or people from outside of the County. As has been the approach adopted by other local authorities in their consumer surveys, shopper surveys are only conducted in larger centres as it is not financially feasible to do it in smaller centres. However, the telephone interview household survey that has been undertaken across the County does provide information on the shopping patterns and views of residents living in smaller centres.

The key point is that, from different sources and approaches, the best available information will be available in respect of the retail landscape which prevails to inform decision making and the shaping of the new County Retail Strategy.

B3.14.2.2 Local, Regional & National Retail Policies

The 2005 Draft County Retail Strategy was informed by the findings of the 2001 GDA Retail Strategy and the new County Retail Strategy will be informed by those of the 2008 GDA Retail Strategy. As with the former, the new County Retail Strategy will be founded in national and regional retail policies and take due account of those that prevail in neighbouring counties at all levels of the retail hierarchy. This noted, it is the objective of the Council to sustain and enhance the competitive position of this County in shopping expenditure patterns as part of ensuring its competitiveness for living, working, leisure and investing in as part of the GDA – the driver of the national economy.

B3.14.2.3 Distribution of Retail Floorspace

The 2005 Draft County Retail Strategy did not allocate any specific quantum of additional retail floorspace to any centre. This responds to the fact that individual centres have their own catchment areas that may, depending on the nature of the development, extend well beyond the County's boundaries, KVOC and Whitewater Shopping Centres being cases in point. Each proposal requires to be examined and assessed under the tests of the RPG, GDA and County Retail Strategy assessment criteria if above the prescribed thresholds. Additionally, in accord with the advice in the GDA Retail Strategy, the Council fully endorses the following set out in paragraph 6.8 of the GDA Retail Strategy:

'Where an application is made within existing defined major town or county town centres, it will not always be necessary to demonstrate the quantitative need for retail proposals in assessing such proposed developments. In setting out the retail impact of the development the report should focus on how the scheme will add/detract from the quality of the town centre – both in relation to improving retail, urban design, integration with the built fabric and quality of life in the town centre. Quantitative and qualitative need must, however, be examined as part of any proposed application that would be in an

edge of or out of centre location and/or not in accordance with retail strategy hierarchy alongside a full sequential test of the proposed location. Provision of new retail floorspace should be in line with the retail strategy hierarchy.....'

The critical guiding point is respect for the County Retail Hierarchy and where different centres are designated within this.

B3.14.2.4 Location of Different Types of Floorspace

The 2005 Draft County Retail Strategy deals with convenience and comparison floorspace separately and this will be the approach adopted in the new County Retail Strategy. The principles of what is appropriate in different locations will be underpinned by the Sequential Approach and the proper planning and sustainable development of any specific area. As such, in general, convenience shopping would not be normally appropriate on a retail park.

B3.15 Strategic and General Issues – Lidl Ireland GmbH

B3.15.1 Submission

- Requests Council reduces existing parking standards for town centre locations in the interests of potential town centre revitalisation and aim to keep large retail development in urban areas.
- Promotes Sequential Approach is no longer significant or necessary and as such its role in the consideration of planning applications should be reduced to reflect strengthened role of forward planning in sorting out the most appropriate location for retail development.
- Requests that key towns of Newbridge, Naas, Athy, Celbridge, Leixlip, Monasterevin and Maynooth are promoted as attractive locations for shopping. Qualified by request that the development of new retail floorspace should not be restricted to town centres and that in order to provide the level of floorspace necessary with expanding populations further opportunities should be provided in suitable edge of out of centre locations.

B3.15.1.1 Neighbourhood Centres

- Retail Strategy should make further recommendations on both type and scale of retail development appropriate in neighbourhood centres and reaffirm the role that discount foodstores' play in modern retailing and the ability to anchor smaller centres or local neighbourhood centres, consistent with RPGs.
- Request Council considers zoning for additional neighbourhood centres in areas where there is an existing centre with no room for expansion. Identification of further district and neighbourhood centres to complement and support existing Major Town Centres should be encouraged. New sites should be well located in proximity to residential development thus allowing for a sustainable and holistic approach to the urban framework. This will have a minimal burden on existing road infrastructure.
- Suggest RIA focus on qualitative issues and propose discount foodstores be facilitated in neighbourhood centres, as per RPG. Suggest it is recognised discount retailers do not have a negative effect on existing retailers as they offer a complementary type of shopping to existing supermarkets and superstores. Note 2005 Joint Committee on Enterprise and Small Business recognised 'discount foodstores are pro-competitive'. Suggest gives clear view of acceptance and integration of discount foodstores in retail selection in Ireland.

B3.15.1.2 GIS

- In context of changing market conditions, Retail Strategy should be reviewed regularly and updates when applicable. GIS system for retailing should be established by Council to report and capture relevant data (e.g. floorspace and land uses in town centres in County). System would be

helpful in reviews and updates and continuing development of Retail Strategy. Type of data: geographical references; name of town or centre; and, floorspace inventory.

B3.15.1.3 National Policy Guidelines & Initiatives

- Consideration should be given to Consumer Strategy Group's 'Make Consumers Count' and subsequent response of High Level Interdepartmental Committee. Needs of consumers need to be taken account of in forward planning policy to ensure Retail Strategy not interpreted prescriptively, thereby inhibiting competition.
- Retail floorspace should be distributed in a sustainable manner to ensure greater flexibility than currently prevails. Emphasis of RPG advising it should be broad guidance.

B3.15.1.4 Zoning

- Permitted inclusion of discount foodstores for consideration should be less prescriptive and 'permitted in principle' be more regularly accorded. Basis is they are beneficial to other neighbourhood activities – offices, retail warehousing, petrol stations, car parks, cash & carry/wholesale outlets. Encourages limited trips and less traffic generation.

B3.15.2 Manager's Response

B3.15.2.1 Parking

Parking standards have been adopted as part of the 2005 – 2011 County Development Plan. The need for the level of parking reflects the predominantly rural nature of the majority of the County and the high reliance on travel by private vehicle for the majority of shopping trips. Amended car parking standards will be examined as part of the review of the 2011 – 2017 County Development Plan.

B3.15.2.2 Sequential Approach

Forward planning provides the framework for the planning of the County and its different centres. In accord with the requirements of the RPG, a key objective is to ensure that the vitality and viability of the different centres is sustained and enhanced through the priority for retail development being within town or village centres, as guided by the tests of the Sequential Approach. The Council, therefore, strongly rejects that the Sequential Approach is no longer significant or necessary and this will be reinforced in the new County Retail Strategy.

B3.15.2.3 Distribution of Retail Floorspace

Newbridge, Naas, Athy, Celbridge, Leixlip/Collinstown, Monasterevin and Maynooth are key towns in the County, as reflected in their designations in the GDA and County retail hierarchies. This position will be reinforced and re-endorsed in the new County Retail Strategy. The 2005 Draft County Retail Strategy recognises the need to meet the needs of large existing and new areas of population around these towns through neighbourhood and district centres and this will remain a policy in the new County Retail Strategy. There will, however, be a presumption against out of centre shopping centres and comparison shopping that would or could potentially compete with town centres. The objective is to meet local needs in a way that is more *efficient, equitable and sustainable*.

B3.15.2.4 Neighbourhood Centres

Unlike the approach to district centres, the RPG do not provide guidance on what the *likely* size of a neighbourhood centre is, they just indicate what their characteristics are likely to be. There is guidance on the size of neighbourhood centres under paragraph 6.25 of the 2008 GDA Retail Strategy. This indicates that they generally provide for one supermarket or discount food store ranging in size from 1,000m² – 2,500m² with a limited range of supporting shops and services. This order of size of the anchor food store plus a range of services may not be appropriate in the context of all of the County's centres in view of their size and the paucity of floorspace in their town or village centres. The Council prefers to judge the scale

and nature of proposed neighbourhood centres on their merits within their individual contexts against the County Retail Strategy assessment criteria. It is recognised that discount food stores are an appropriate anchor for neighbourhood centres but the size of the store requires to be appropriate in the local context.

The 2005 Draft County Retail Strategy established the strategic principle of neighbourhood and district centres being required in areas with existing and emerging populations. As noted, this will be re-endorsed in the new County Retail Strategy but it will be the function of development plans to translate this into zonings, as has been the practise to date.

In accord with the RPG, GDA Retail Strategy and the approach adopted in the Draft County Retail Strategy, both quantitative and qualitative factors – as set down in the respective assessment criteria – will be considered in respect of proposals for new or expanded neighbourhood centres and this will be incorporated in the new County Retail Strategy.

B3.15.2.5 GIS

Consistent with the commitment in the Draft County Retail Strategy, it will be the intention of the Council to monitor and review the new County Retail Strategy over the timescale of the emerging County Development Plan. The frequency and detail of this process will be highly dependent on the staffing and financial resources available to the Council.

B3.15.2.6 National Policy Guidelines & Initiatives

The 2005 Draft County Retail Strategy states that it is the goal of the Council to sustain and improve the retail profile and competitiveness of the County within the retail economy of the GDA and beyond. Aligned with this, an important objective in the Draft County Retail Strategy is to ensure that the needs of the County's residents are met as fully as possible within Kildare, taking due cognisance of the GDA Retail Hierarchy. This goal and objective will remain a key thrust of the new County Retail Strategy. The Council does not seek to inhibit competition but this requires to be considered in parallel to ensuring the proper planning and sustainable retail planning of the County and its different centres at all levels of the County Retail Hierarchy.

In accord with paragraph 36 (iii) of the RPG, the Draft County Retail Strategy and adopted County Development Plan provide a broad assessment of the requirement for additional retail floorspace across the County. Neither prescribes the quantum that may be appropriate in different centres in the County Retail Hierarchy to provide flexibility. The level a particular centre is in the County Retail Hierarchy, the strategic retail and economic objectives for the different centres set out in the retail policies of the Draft Strategy and adopted Plan and the assessment criteria set for large retail proposals are the control factors in respect of what is the appropriate level of retail floorspace within a particular centre to ensure that needs are met in a way that is *efficient, equitable and sustainable*. These principles will be reinforced and re-endorsed in the new County Retail Strategy.

B3.15.2.7 Zoning

Zoning is not a function of the County Retail Strategy. Its role is to provide strategic guidance and general and specific policies that are then incorporated as appropriate in emerging development plans/LAPs or as variations to plans. In respect of all types of food store, the priority will remain that their location is guided by the tests of the Sequential Approach and compliance with RPG, GDA Retail Strategy and County Retail Strategy assessment criteria for large retail developments.

B3.16 Fine Gael – Alan O'Kelly of Naas Town Council

It is noted that this submission was not included on the Council's list provided to Declan Brassil & Company Limited but it was provided to the consultants for review. As such, it has been reviewed and responded to in the Manager's Report on the submissions.

B3.16.1 Submission

- Recognition that Naas is the County Town of substantial and growing size drawing people from across its hinterland. Highlights recognition that town faces challenges in developing its full potential and strong competition from both inside and outside County, particularly in respect of quantum of floorspace.
- Naas has potential advantages that should be maximised – large town, good variety of clothes shops and excellent Main Street which allows for good mix of shops. It is an old town with significant potential for tourism that could be combined with greater emphasis on shopping.
- Three objectives for any Retail Strategy were identified as:
 - To ensure retail needs of residents of County and Naas met insofar as possible in County
 - To minimise potential expenditure leakage from County
 - To promote County as a major shopping and tourism location
- In addition to Main Street, scope for additional development in Canal Dock Area and ring roads and bypasses open up potential of the Main Street. Kilkenny highlighted as an exemplar. Tools to harness potential identified as:
 - Renewal drive by Town Council for town centre with Kilkenny as a model
 - Run competition for 2050 vision for Naas. Issue of redressing traffic congestion in town highlighted
 - Identification of locations for local shopping
 - Continuing to secure critical mass of warehouse/large retail space
 - Preparation and implementation of a plan to harness Naas' potential as a heritage and tourism centre linked to its retail potential.

B3.16.2 Manager's Response

The role and importance of Naas as the County Town in the County Retail Hierarchy is recognised by the Council and in the GDA Retail Strategy. Based on the Council's involvement in the preparation of the GDA Retail Strategy and submission on the Draft Regional Retail Strategy, the need to promote and encourage the enhancement of retail floorspace in Naas to reflect its role as a major town centre, the significant population growth it has experienced over the last decade and to create a thriving active town centre is incorporated as a Council Specific Policy Recommendation in the 2008 Regional Retail Strategy. This distinguishes Naas from Newbridge in the strategic retail planning objectives for the County and the aim of Naas fully becoming the most important centre in Kildare, across all levels of economic activity and investment. This will be reinforced and re-endorsed in the new County Retail Strategy.

Naas has witnessed a significant increase in retail floorspace since the 2001 GDA Retail Strategy was prepared, largely driven by the quantum of modern format bulky goods floorspace that has been delivered. This is set to continue with the pending opening of the Corban's Lane scheme. It is, however, recognised that for Naas to sustain its role and importance there requires to be a continuing improvement in its comparison offer, particularly in respect of high and middle order floorspace, if the County Town – which is increasingly becoming part of the GDA Metropolitan Area – is to effectively compete with the Level 2 Metropolitan Area Major Town Centres in the GDA Retail Hierarchy. This is consistent with the approach adopted in North East Kildare with the designation of Leixlip (including Collinstown) as the Level 2 Metropolitan Area Major Town Centre to serve this area of the County.

The County Town is recognised as having a quality and specialist women's clothing and footwear offer which responds to the general affluence of its hinterland. In contrast to Newbridge, as a direct result of the introduction of the Whitewater Shopping Centre, Naas does not have any presence of international department stores or a critical mass of national and international high street comparison brands. The Corban's Lane scheme will not wholly redress this but there are emerging town centre and edge of centre

opportunities that can and the harnessing of the potential of these sites will be identified in the new County Retail Strategy. This will specifically address the issue of meeting the requirements of large and medium sized comparison operator requirements which currently cannot be met in Naas Town Centre. The heritage and tourism potential of the Naas will also be reinforced in the new Strategy as part of the attraction and asset of the County Town, with the Kilkenny model and success acknowledged although it is recognised that Kilkenny still lacks a critical mass of higher and middle order comparison shopping. This observation is founded on the consultancy's work over a number of years as retained retail advisor to both Kilkenny County and Borough Councils and more recent work on the preparation of the South East Gateway Regional Retail Strategy.

As is set as the main goal and objectives, specific and general policies in the Draft County Retail Strategy, the new County Retail Strategy will provide the framework for: the retail needs of residents in the County and Naas to be met as fully as possible within the Kildare; minimising retail expenditure leakage; and, the County growing its role and importance as a major shopping and tourism destination. This equally applies to the Newbridge and other key centres in the County Retail Hierarchy. The response focuses on Naas as this is the subject of the submission.

The Draft County Retail Strategy recognises and promotes harnessing the retail potential of Naas in respect of: the Canal Dock Area; existing and growing residential areas; and, the County Town's heritage and tourism asset. The need to redress traffic congestion in the town is an issue well acknowledged by both the Council and Naas Town Council and the framework for this is set out in the IFPLUTS study.

Naas is the premier location in the County for modern format retail parks/bulky goods floorspace. Sustaining and enhancing this will be incorporated in the new County Retail Strategy. However, it requires to be recognised that market dynamics is an important factor in how much retail floorspace can be sustained in an area given that securing a DIY anchor is the essential prerequisite and these operators work on a regional and not county basis.

The market view is that the bulky goods market potential is saturated, hence the pressure for this space to have restrictions removed to enable mainstream comparison/high street large space requirements being able to be met on existing retail parks. This is not unique to Naas or the County. In the interests of sustaining and enhancing the vitality and viability of Naas Town Centre, and other centres in the County, the Council has maintained the restrictions and this position will remain in the new County Retail Strategy.

B3.17 Conclusion

The 16 submissions have provided very valuable insights to the perspectives of the market, retail industry representative organisations and landowners that will be fully taken into account in the preparation of the new County Retail Strategy, as reflected in the Manager's response to the different submissions.

B4 GLOSSARY OF TERMS

A Glossary of Terms was provided in the July 2009 Manager's Report on submissions to the Pre-Draft Public Consultation Stage of the preparation of this County Retail Strategy to assist the reading of the document. This has been extended and amalgamated in Appendix A of this County Retail Strategy to avoid duplication in text and terminology.

APPENDIX C – RIS/RIA GUIDANCE NOTES

C1.0 INTRODUCTION

The Department of the Environment, Heritage and Local Government (DoEHLG) Retail Planning Guidelines for Planning Authorities (RPG) provide guidance on the six main steps that commonly comprise the assessment of retail impact. The guidelines do not prescribe that this is the only approach to Retail Impact Statements/Retail Impact Assessments (RIS/RIA) but on the whole they have been accepted by Planning Authorities, An Bord Pleanála (the Board), Applicants and the industry.

The RPG were issued by the Department in December 2000 as Ministerial guidelines under Section 28 of the Planning and Development Act 2000. Section 28 of the Act indicates that Planning Authorities and the Board shall have regard to Ministerial guidelines in the performance of their functions. They were revised in January 2005 and are currently under review. The 2005 RPG incorporated specific provisions for large scale retail warehouses being permissible in Integrated Area Plan (IAP) areas in National Spatial Strategy (NSS) Gateways, subject to particular assessment criteria being met. The revised provisions are, therefore, not applicable to any part of County Kildare (the County).

The guidance was largely set out in advance of the preparation and adoption of retail strategies around the country and, therefore, the detail of the information required to prepare robust and transparent RIS/RIA was generally not available. This information became available in the County to Applicants in the 2005 Kildare Draft County Retail Strategy (the 2005 Strategy) and is updated in the 2010 Kildare County Retail Strategy (the County Retail Strategy). However, Kildare County Council (the Council) deemed that additional guidance be provided in the County Retail Strategy to assist Applicants prepare RIS/RIA.

The Council does not intend that the guidance notes be prescriptive and Applicants are not obliged to follow the guidance. The purpose of these notes is to provide helpful guidance to Applicants in the preparation of RIS/RIA and to set out the range of information and analysis the Planning Authority would expect Applicants to provide. The aim is to help expedite a retail application's passage through the planning process by reducing the requirement for the Council, and the two other Planning Authorities in the County, namely Naas Town Council and Athy Town Council, to request further information and clarification on the application. Following the guidance notes does not guarantee either planning approval or that no further information will be requested from Applicants as each application and RIS/RIA will be assessed on their merits and compliance with the County Retail Strategy's assessment criteria for retail developments.

The guidance notes have been prepared to be consistent with the RPG. They are only concerned with retail planning matters and do not extend to other supporting components of a planning application for retail development, such as Environmental Impact Statements (EIS).

The guidance notes are structured as follows:

- i. The purpose of the RIS/RIA;
- ii. Statutory guidance;
- iii. Approach to retail impact assessment;
- iv. Common problems found in RIS/RIA; and
- v. Glossary of terms.

C1.1 Purpose of the RIS/RIA

Annex 4 of the RPG states the following in respect of the purpose of RIS/RIA:

'The purpose of an impact study is to provide clarity and guidance for decision makers. Clear, well reasoned and impartial submissions should be made which seek to address uncertainty and inform all

parties.’ (Annex 4 Paragraph 3)

With respect to retail planning matters, what decision makers are concerned with are:

- Understanding the quantum and nature of the proposed retail development
- Confirming that the proposed development is consistent with national, regional and local planning policies and specifically the relevant development plan and retail strategy
- Confirming whether or not the proposed development will have an adverse retail impact or cumulative retail impact on one or more centres.

C1.2 Statutory Guidance

For planning applications made to the Council or the two other Planning Authorities, RIS/RIA must at a minimum be consistent with:

- i. The RPG;
- ii. The 2008 Retail Strategy for the Greater Dublin Area (2008 GDA Retail Strategy);
- iii. The relevant Development Plan, Local Area Plan (LAP) and Action Area Plan (AAP) covering the area; and
- iv. The policies and objectives set out in the County Retail Strategy and specifically the assessment criteria for retail development proposals. In the case of applications made to Athy Town Council, this would also include consistency with the 2008 Athy Town Retail Strategy.

As set out in the County Retail Strategy, where an application is made within existing defined Level 2 Major Town or County Town Centres it will not always be necessary to demonstrate the quantitative need for retail proposals in assessing such proposed developments. In setting out the retail impact, the focus should be on how the scheme will add/detract from the quality of the town centre in respect of improving the retail offer, urban design, integration with the built fabric and quality of life within the town/centre. However, this only applies to town centres and edge of centre or proposals not in compliance with the retail hierarchy should have a full assessment, specifically with regard to the tests of the Sequential Approach. This guidance is in accordance with that provided in the 2008 GDA Retail Strategy.

As has been interpreted in the GDA Retail Strategy and endorsed by the Board in a number of key decisions, including that on the Naas Shopping Centre, the RPG do not specifically require that a quantitative RIA be undertaken in support of a retail application. What the RPG require is that criteria set out in Paragraph 65 of the guidelines should be addressed.

C1.3 Approach to Retail Impact Assessment

A thorough and robust RIS/RIA relies on both a quantitative and qualitative assessment of the proposed development. The key components of the quantitative and qualitative assessments are identified in the paragraphs that follow.

C1.3.1 Quantitative Assessment

The preparation of a robust and transparent RIS/RIA requires the Applicant to gather and clearly present the following **baseline information**:

- Description of the proposed development and its **proposed floorspace** including its gross floorspace and net retail sales area, the types of retail goods proposed for sale as defined in

Annex 1 of the RPG and the net to gross floorspace ratios used for convenience, mainstream comparison and bulky goods floorspace. These ratios should be consistent with the industry norm or explanation provided on why they deviate. Within the GDA, an important reference point for turnover ratios is the 2008 GDA Retail Strategy.

- The **turnover ratios** per metre square (m²) for the type(s) of floorspace proposed from sources that are transparent and defensible. The ratios should be for new floorspace and not existing floorspace, reflecting that the former has a higher turnover ratio than the latter.
- Identification of the **Base Year** for the proposed development, which is generally taken to be the year of application and on which capacity and retail impact assessments are based.
- Identification of the **Design Year** of the proposal, which is the year when the retail development will be fully trading. Depending on the particular proposal, normal trading is generally assumed to be at least 12 to 24 months after the development has opened. The Design Year should be realistic and recognise the timescales generally involved in progressing through the planning process and the development of the proposal, particularly in respect of large retail applications.
- Definition of the proposed development's **catchment area**. While drive times are commonly used to define catchment areas, other factors need to be taken into account such as: the retail offer proposed by the Applicant; the relative strength of centres that may compete with the proposed development; existing transportation infrastructure and that which will be in place at the time of the Design Year of the proposal; and, where possible, household and shopper survey data which illustrate current shopping patterns. It should be recognised that, with the exception of centres/locations close to the Dublin conurbation, Kildare is predominantly a rural county and residents will have to travel longer distances in such areas to meet the majority of their shopping needs. Additionally, the nature and scale of any development will be an important factor in the definition of the appropriate catchment area. For example, both the Whitewater Shopping Centre in Newbridge and the Kildare Village Outlet Centre in view of their offer have mass appeal that extends beyond the County's boundaries whereas a Neighbourhood Centre will have a much more limited catchment. Given the proximity of many of the Kildare's centres to the boundaries of other counties, in such cases, depending on the specific proposal then the catchment area would be anticipated to cross the County's boundaries. This principle is recognised in Paragraph 36 and Annex 3 of the RPG.
- A clear and transparent method of **estimating the catchment area's current population and projected population** at the Base Year and Design Year respectively, relying as much as possible on authoritative information sources such as CSO Census data, DoEHLG Circulars, Regional Planning Guidelines (noting that if a catchment area extends beyond the GDA then data/projections from other Regional Planning Guidelines will also require to be taken account of) and Development Plans/LAPs.
- The **Price Year** adopted in the RIS/RIA. This is generally derived from the most up to date aggregated data published by the CSO in respect of the Annual Services Inquiry (ASI) and Regional Incomes and County Gross Domestic Product (GDP). It changes annually but is normally two or three years behind the current year. For example, the Price Year adopted in the County Retail Strategy was 2006 as this was the year that the aggregated data were available at the end of March 2009, which was the freeze date adopted for baseline information for the Strategy. The RIS/RIA supporting in any retail applications will require to ensure that the most recent Price Year is applied as this has important implications for deriving the right **per capita spend** information, which underpins the calculation of the **Gross Expenditure Potential** of the proposal's catchment area.
- **Per capita spend** information for convenience and comparison expenditure should be the most up

to date and this is particularly important given the positive and negative fluctuations in the economy that have prevailed over the last 10 to 15 years. It should be informed by the most recent Economic Social and Research Institute (ESRI) Medium Term Review or Quarterly Outlook, accepting that there other authoritative sources that could be referenced to.

- **Retail floorspace information for the key centres** in the catchment area, an estimate of the current turnover of these centres between the Base Year and the Design Year. This is key information for the capacity assessment and the assessment of retail impact. Floorspace information is available for the main centres in the County in the County Retail Strategy and is available for the majority of neighbouring counties in their retail strategies or retail studies that have been undertaken. The Applicant should ensure that supplementary information, if appropriate, is gathered.
- **Detail of extant planning permissions** for large retail developments in the catchment area of the proposal that includes identification of the nature and quantum of granted floorspace and an estimate of the proposed development's turnover at the appropriate Price Year. Where the catchment area extends into neighbouring counties then details of extant permissions for the relevant area will also require to be obtained and taken into account, noting that all of the turnover supporting these proposals will not wholly be derived from the Subject Application's catchment area. The RIS/RIA should clearly set out what the turnover of these proposals that will be derived from the catchment area spend are. While extant permissions (applications that have full planning consent) are required to be taken into account, it is good practice to identify significant emerging proposals, where sufficient detail is available. This is particularly important if any of these proposals better meet the tests of the Sequential Approach and the County Retail Strategy assessment criteria for retail applications. The precedent for this consideration/guidance has been set by the Board in a number of appeals. The guidance notes are advising that this position is addressed and examined at the outset as part of the aim of assisting appropriate proposals through the planning process.
- Ideally, **Household and Shopper Surveys** should be used to determine the current shopping patterns of residents in the catchment area (Household Survey) and those from outside who are shopping in the area (Shopper Survey). These respectively determine retail expenditure retention and inflows. They, however, invoke additional expense to the preparation of a planning application and would generally only be envisaged to be commissioned as part of a significant retail proposal. It is highlighted that undertaking these surveys is not a requirement of the Council. Importantly, the County Retail Strategy and the 2008 GDA Retail Strategy provide sound source survey information for Applicants. They are, however, relevant to a specific point in time and the retail landscape that prevailed at that time. The onus is on the Applicant to ensure that the interpretation of these surveys is relevant to the proposed development at the time of application and that changes to the retail landscape of the catchment area and its wider context are wholly taken account of.
- **Health Checks** – it is important to the assessment of retail and cumulative impact to understand the nature and offer of centres within the catchment area and that of main centres adjacent to the area as these are the centres which could be affected by a new retail development. The health check information should be guided by the checklist in Annex 2 of the RPG. It is, however, acknowledged that some of the detailed information (such as rents and yields data) is not available for a large number of smaller centres in the County or around the country. The County Retail Strategy provides detailed appraisals of the main centres in the County which should be an important reference point for Applicants, but as with consumer surveys, they represent the position at a certain point in time and it is recommended that they be reviewed and updated as appropriate in the preparation of RIS/RIA.

The baseline information is an important input to the following:

- i. Capacity assessment;
- ii. Retail Impact Assessment;
- iii. Cumulative Impact Assessment; and
- iv. Consideration of the displacement of retail activity.

C1.3.1.1 Capacity Assessment

The purpose of a capacity assessment is to demonstrate whether or not there is sufficient expenditure potential in a catchment area to support a proposed development. The County Retail Strategy identifies the indicative floorspace capacity for additional retail floorspace in the County over the period to 2022. There are two principles that require to be highlighted with regard to the assessment of capacity for additional retail floorspace:

- The figures presented in the capacity assessment provide a broad assessment of the requirement for additional new floorspace. They should, thus, be taken as indicative and as guidance on the quantum that will be required and are in no way intended to be prescriptive. It is not the purpose of the County Retail Strategy capacity assessment to place a cap on the scope for future retail development in the County.
- As recognised in the RPG, the catchment areas of retail developments do not usually coincide with local authority boundaries. Different centres and different developments will have different catchment areas and the size of this will depend on the importance and attraction of the centre/development. The capacity assessment for new retail developments should relate to the catchment area of the particular development. To assist transparency, it is recommended that the assessment for the proposal be put in the context of the overall expenditure capacity of the County and the reasons for differences specifically identified.

The County Retail Strategy provides the detail on how a capacity assessment should be constructed and the inputs required for the exercise. It provides a model which Applicants should have reference to. Applicants should ensure that the baseline and the inputs are the best and most up to date available. Where there are gaps in information, the onus is on the Applicant to redress this and where professional judgement is applied then this should be explained in a simple and clear way.

C1.3.1.2 Retail Impact Assessment

Retail impact is defined as the effect of a new development on the retail turnover of existing centres. The RPG are clear that planning authorities are not expected to be concerned about individual retail businesses and should focus on the impact on the turnover of centres in a catchment area. The key to estimating retail impact is determining the pattern of trade diversion that will result from the proposed development. The Applicant needs to make reasoned judgements about the share of the proposed development's turnover that will be diverted from existing centres. The basis for the pattern of trade diversion should be the health checks of existing centres, which should include a well sourced estimate of the current floorspace.

There are a number of ways of expressing retail impact, but the most common approach is to express the retail impact on a centre only when its turnover is driven below the Base Year turnover of the centre. In many cases, no retail impact will be registered because projected turnover growth of a centre between the Base Year and the Design Year of the proposed development absorbs the trade diverted by the proposal. Where trade diverted does reduce the centre's turnover below its Base Year level, the reduction – or impact – is expressed as a percentage of the Base Year turnover.

C1.3.1.3 Cumulative Retail Impact

Cumulative retail impact assessment is only required where there a number of full planning permissions for

other retail developments in the catchment area of a proposal. Where this occurs, the Applicant needs to consider how the proposed development together, or cumulatively, with the relevant extant development(s) might have an impact on centres within or adjacent to the catchment area. In general, other granted developments will tend to increase the impact on individual centres, but this depends on the type of retail offer and assumed patterns of trade diversion. Again, health check information provides a vital basis for justifying patterns of trade diversion, not just for the proposed development, but also for other large developments that have been granted planning permission.

The Applicant is only obliged to consider planning permissions granted for large retail developments in the catchment area. However, it is helpful and good practice to also take into account emerging developments where adequate and reliable information is available.

C1.3.1.4 Consideration of the Displacement of Retail Activity

As has been set out under Sub Section C2 of the guidance notes, the RPG, 2008 GDA Retail Strategy and the County Retail Strategy recognise that it is not always necessary to require that a quantitative RIS/RIA be undertaken in support of a retail application, providing it is within a Level 2 Major Town or County Town Centre and that the assessment criteria listed under Paragraph 65 of the RPG are fully addressed. This is a sound and sensible approach to retail planning in the heart of town centres. However, what has not been recognised or highlighted is there requires to be further qualification introduced to the approach and this relates to potential for the displacement of retail activity within these centres. This is a position where a major new development in a centre effectively results in a key new attractor or national and international convenience and comparison retailers locating in a new development and existing businesses choosing to relocate to the scheme. The potential effect is displacement of retail activity in all or parts of the traditional town centre to the detriment of the vitality and viability of the existing Core Retail Area. Examples of where this has happened include Carlow and Letterkenny. Therefore, although it is accepted that it will not always be necessary to require that a quantitative RIS/RIA be undertaken in respect of proposals located within a Level 2 Centre, Applicants are advised to address the potential issue of the displacement of retail activity and this is consistent with meeting the requirements of the first point under Paragraph 65 of the RPG, which relates to demonstrating whether a proposal would or would not support the long term strategy for town centres as established in the development plan.

C1.3.2 Qualitative Assessment

Consideration of retail applications is not solely a quantitative exercise, a full RIS/RIA should also address a range of qualitative considerations. The following summarise the range of qualitative inputs that should be addressed. The list is provided as guidance and individual applications may require to consider factors that are specific to the application. The key qualitative inputs are identified as:

- i. Land use planning and policy review;
- ii. Demonstration of the Sequential Approach;
- iii. Presentation and interpretation of health check information;
- iv. Presentation and interpretation of household and shopper survey findings; and
- v. Addressing the relevant assessment criteria.

C1.3.2.1 Land Use Planning & Policy Review

A policy review will usually be a component of the EIS accompanying large planning applications. EIS are, however, not always required for all retail planning applications. As RIS/RIA are generally freestanding documents then it is helpful for the land use and policy review to be provided in the RIS/RIA. The review should set out the policy framework under which the retail development will be assessed. The policy

framework will be specific to individual applications and is likely to change over time. The onus is on the Applicant to ensure that the policy framework is up to date. The range of policy guidance which will require to be considered will include review of:

- The RPG
- The National Development Plan (NDP), NSS, Transport 21, A Platform for Change and the Regional Planning Guidelines Greater Dublin Area (RPGGDA)
- The 2008 GDA Retail Strategy
- The County Development Plan and County Retail Strategy
- Any other Development Plan, LAP, AAP or Masterplan covering the Subject Site.

The purpose of such a review is to establish the basis of case for the proposed retail development by linking the features and characteristics of the proposal with the aims, objectives and policies presented in these planning policy documents. The Applicant should take the opportunity to justify their proposal where it might be interpreted to being inconsistent with stated planning policy and where a variation to the Development Plan, LAP, AAP or Masterplan might need to be considered. It is recommended that the detail of this position is well developed in advance of any Pre-Application Consultations with the appropriate Planning Authority in the County.

C1.3.2.2 Demonstrating Application of the Sequential Approach

The Sequential approach is established as fundamental principle of retail planning and is clearly set out in the RPG and County Retail Strategy. In Paragraph 59 of the RPG, the Sequential Approach is defined as follows:

‘Having assessed the size, availability, accessibility and feasibility of developing both sites and premises, firstly within a town centre and secondly on the edge of a town centre, alternative out of centre sites should be considered only where it can be demonstrated that there are no town centre or edge of centre sites which are suitable, viable and available. This is commonly known as the sequential approach to the location of retail development.’

The RPG state that the preferred location for new retail development, where practical and viable, is within a town centre or district centre or major village centre. There will be instances where retail development of the nature and scale proposed cannot be located within existing centres and this is recognised in the RPG and County Retail Strategy. Existing Development Plans, LAPs, AAPs and Masterplans identify and zone appropriate locations for edge of centre and out of centre retail development. This guidance will be further provided in the emerging policy frameworks that are at different stages of the plan making process. Where alternative locations are identified by the Applicant, it will be important for the Applicant to objectively demonstrate that the tests of the Sequential Approach have been met.

C1.3.2.3 Presentation & Interpretation of Health Check Information

The assessment of retail and cumulative impact requires an in depth understanding of the characteristics of the different centres within and adjacent to the catchment area of a proposed development as these are the centres which could potentially be adversely affected by the proposal. A great deal of this information is available in the County Retail Strategy and in the retail strategies of neighbouring planning authorities. The onus is, however, on the Applicant to ensure that health checks are undertaken of all relevant centres in and adjacent to the catchment area of the proposed development and that the information is up to date.

The purpose of the health check information is to help the Council and other two Planning Authorities in the County determine whether or not a centre will be adversely affected by a proposed retail development. Guidance of what information should be incorporated in a health check is provided in Annex 2 of the RPG.

It is acknowledged that all of the information, particularly on rents and yields, may not be available for smaller centres. This is a position which is not unique to the County. Where it is not available, this should be identified by the Applicant.

An important role of a health check is that it provides key baseline information to help inform judgements on the pattern of trade diversion from existing centres in or adjacent to the catchment area of the proposed development. The judgement will also be informed by information on current shopping patterns for different categories of shopping. For example, smaller centres on the whole are likely to be catering predominantly for daily needs and this will be evident from the nature and scale of their respective retail offers. Larger higher order convenience or comparison developments are unlikely to result in any discernible increase in trade diversion from such centres as it is happening already – household and shopper surveys will confirm this. Without a health check, the basis of professional judgements on trade diversion, and ultimately retail impact, in general will not have a sound foundation.

C1.3.2.4 Presentation & Interpretation of Household & Shopper Survey Information

Household and shopper surveys provide valuable information on current shopping patterns. They provide key insights into the existing picture of the market share and trade draw of a centre/county for different types of shopping. Patterns change over time due to how different centres/counties are performing against other centres/counties, which is directly linked to the offer and attraction of the centre/county against competing centres/counties.

Surveys were undertaken in the preparation of the 2001 GDA Retail Strategy, 2008 GDA Retail Strategy, the 2006 Athy Town Development Plan and the County Retail Strategy. These surveys provide important quantitative and qualitative time series baseline information to inform assessments of trade diversion and retail impact in RIS/RIA. The findings may be directly adopted/incorporated in RIS/RIA but this may not be appropriate for all emerging retail proposals. In such circumstances, particularly in respect of large retail developments, it is advisable that surveys specific to the catchment area are commissioned. The alternative is that the existing baseline of time series surveys is critically appraised in the light of the changed retail landscape which prevails at the time the application is being prepared.

C1.3.2.5 Addressing the Relevant Assessment Criteria

Under Paragraph 36 of the RPG, the guidelines state that the identification of the criteria for the assessment of retail developments is one of the six matters which *'are to be included in all future development plans'*. The need for the identification of assessment criteria for retail developments, in addition to the guidance and criteria set out in the RPG, the 2008 GDA Retail Strategy and the goals, objectives and policies for retail planning and development in the Development Plans, LAPs and AAPs which have been adopted or are in the plan making stage, reflects the following two factors:

- i. The complexity of RIS/RIA and the approaches to both often lack the clarity and transparency to assist decision makers determine whether a proposal will or will not have an adverse impact on one or more centres in or adjacent to the catchment area of a proposed development; and
- ii. The need to specifically set out to Applicants what the key factors that the Council and the other two Planning Authorities in the County deem are fundamental to consideration of individual applications.

The RPG set out, under Paragraph 65 of the guidelines, the six criteria that Applicants should address in relation to retail impact. A further set of assessment criteria are outlined in Part 6 of the 2008 GDA Retail Strategy. In accordance with the RPG, the 2005 Retail Strategy and the County Retail Strategy have identified criteria that require to be addressed by Applicants in support of retail applications and have been incorporated in existing and emerging Development Plans by the Council and the other two Planning Authorities in the County. In the preparation of all retail applications, Applicants should address the prescribed national, regional and local (County) assessment criteria for retail applications and, in doing so,

demonstrate both quantitatively and qualitatively whether the proposal will or will not cause an adverse impact on one or more centre. The importance of this is that these are key frameworks in the Council and other two Planning Authorities' appraisal of retail applications and if Applicants squarely addressing them in the preparation of their RIS/RIA then this will greatly assist expeditious determination of the planning application.

In addressing the suite of assessment criteria, the statements made by Applicants should be defensible and reflect the evaluation process undertaken in the preparation of the RIS/RIA.

C1.4 Common Problems Found in RIS/RIA

Robust RIS/RIA require sound baseline information and the County Retail Strategy provides an important suite of information for Applicants to achieve this. The onus is, however, on Applicants to construct the baseline information which is appropriate to the proposed retail development. In addition, in recent years, there have been many conventions established and accepted by planning authorities, the Board and the industry in respect of retail developments which should be incorporated in RIS/RIA. Where there is a deviation from these, the onus is on the Applicant to justify why it is appropriate to the proposed development.

The Council, and the other two Planning Authorities in the County, seek RIS/RIA to be constructed which provide clear and defensible information and assumptions/professional judgements. From the RIS/RIA that have been submitted to date to the three Planning Authorities within the County and review of RIS/RIA submitted to other Planning Authorities, the guidance notes highlight areas where Applicants should pay due attention in the preparation of their RIS/RIA. As the robustness and approaches to RIS/RIA continue to evolve and conventions become further established, it is anticipated that additional areas in respect of applied retail planning will emerge which will require to be addressed by Applicants. These will be incorporated in future revisions to these guidance notes. In the interim, the onus is on Applicants to ensure that RIS/RIA incorporate the best available information and adopt the most up to date and substantiated conventions in the industry which prevail at the time of the preparation of the planning application. Based on review of previous retail applications to the three Planning Authorities, the Council identifies the key areas of weakness in RIS/RIA as:

- Failure to properly detail the retail floorspace proposed in terms of the net retail area and the clear quantification of the type and nature of the floorspace envisaged (convenience, mainstream comparison and bulky goods).
- Wrongly indicating that convenience superstores, supermarkets and discount foodstores only sell convenience goods. In recent years, there has been an increasing trend for a greater proportion of floorspace in each of these formats to be devoted to comparison goods. This requires to be reflected in RIS/RIA.
- Failure to clearly identify and justify the turnover ratio (€ per m²) used for the different types of floorspace proposed. There are generally accepted turnover ratios for different formats of convenience and comparison floorspace that should be applied, which will increase on a year by year basis. The turnover ratios of existing floorspace are recognised as being lower than that of new floorspace, reflecting that it is generally less efficient. It will not be appropriate to apply the latter ratios to emerging proposals.
- Catchment areas in rural and major urban centres differ with the latter being on the whole more extensive in view of the higher order convenience and comparison shopping on offer. These patterns are confirmed by household and shopper survey surveys. The patterns need to be fully recognised in RIS/RIA and over extension of realistic catchment areas reduced.
- Use of out of date population data and projections that are not informed by the most recently

available Census or authoritative sources projections. In addition, where the catchment area for a proposal extends into one or more neighbouring county or region then the data and projections prevailing in these jurisdictions require to be incorporated in the construction of baseline population and projected population data for the Base Year and Design Year of the proposed development.

- Failure to identify all the relevant and current extant retail planning permissions in or adjacent to the catchment area of the proposed development. Retail proposals that have full planning consent will have an effect on the expenditure capacity for additional retail floorspace. They will also require to be incorporated in the assessment of cumulative retail impact. The retail sector, although greatly affected by the current downturn in the economy, remains one of the most competitive. The onus is on Applicants to ensure that retail proposals which are in excess of the assessment criteria for different parts of the County and in neighbouring counties are incorporated in the RIS/RIA and cumulative impact assessment.
- Unsubstantiated patterns of trade diversion used in the analysis of retail and cumulative impact. The assessment of trade diversion, and subsequently retail and cumulative impact, is accepted as resting greatly on professional judgement. This should be demonstrated to have been informed by an understanding of the characteristics of the different centres within and adjacent to the catchment area of the proposed development and by the findings from household and shopper surveys. Additionally, particularly in respect of larger retail proposals, the wider context within which they sit is generally not provided.
- Understanding shopping patterns. In the County, and on the whole also found in neighbouring counties outside of the Dublin conurbation, people in smaller centres in the retail hierarchy generally have to travel to larger centres to meet their main shopping needs. Therefore, enhancement of the offer of larger centres is unlikely to have any real discernible effect on these smaller centres as the trade diversion/expenditure leakage is already occurring. The RIS/RIA requires to display an understanding of existing shopping patterns and feed this into professional judgements on market share, trade draw, trade diversion which will consequently translate into the assessment of retail and cumulative impact.
- Planning is development plan driven. However, in recent years there has been an increase in the scope and importance of the policy framework that underpins development plans, which have weight in the determination of planning applications. It is no longer sufficient to reiterate the land use and policy framework for a proposal – there requires to be succinct evaluation of this policy framework and how it supports or otherwise the basis of case for the proposal.
- Inadequate demonstration that the Sequential Approach has been fully applied and potential town centre and edge of centre sites have been soundly appraised. The alternatives may not be appropriate but the onus is on the Applicant to illustrate to the relevant Planning Authority in the County why they are not.
- A key issue in the assessment of retail impact is what the potential effect at the Design Year of a proposal will be on existing centres. To be able to assess this with any weight requires presentation of the characteristics and retail offer of the different centres within and adjacent to the catchment area of the proposal. Baseline information on the main centres in the County is provided in the County Retail Strategy and, to differing degrees, on centres in neighbouring counties. Applicants, however, should illustrate that they understand the characteristics of different centres within and adjacent to the catchment area of the Subject Application and that their assessments are as comprehensive as possible and up to date.
- The RIS/RIA often fails to provide what is a clear objective evaluation of the proposal which presents a logical step by step assessment of the retail and cumulative impact of a proposed development on one or more centres.

- There is a need to ensure that Applicants fully address the assessment criteria for retail developments set down in the RPG, 2008 GDA Retail Strategy and County Retail Strategy (as incorporated in the emerging County and Naas Town Development Plans). These are the frameworks under which any retail proposal in the County will be assessed and addressing the requirements of these assessment criteria in the preparation of applications for retail proposals will greatly expedite their determination by the Council and two other Planning Authorities. It is recommended that this is the approach adopted by Applicants

C1.5 Glossary of Terms

The Glossary of Terms underpinning the guidance notes are incorporated in Appendix A of the County Retail Strategy.





Kill



Crookstown



Clane



Moone



Kilcullen



Leixlip



Monasterevin



Monasterevin



Prosperous



Rathangan



Rathangan



Sallins



Sallins



Sallins



Straffan



Timolin