5 REVIEW OF COMPETING CENTRES

5.1 Athy sits in a highly competitive sub regional retail landscape in which there is a mix of both higher order centres and growing centres that are of the same level in the retail hierarchy. The performance and potential of all of these centres will have a particular influence on the competitiveness and attraction of the town and its scope to enhance and sustain its role, importance and profile as the Sub County Town Centre serving the retail needs of the south of the County in a way which is efficient, equitable and sustainable. To enable this context to be understood and the study to provide the appropriate responses and recommendations, this section presents a summary review of the characteristics and potential of the main competing centres. Founded on the findings of the household and shopper surveys, the following have been identified, in alphabetical order, as the main competing centres:

i. Carlow;

ii. Kildare Town;

iii. Naas;

iv. Newbridge; and

v. Portlaoise.

CARLOW

5.2 The NSS designates Carlow as a County Town for the county of the same name, and also is describes it as an '*Urban Strengthening Opportunity*'. It has important strategic road connections with Dublin, Kilkenny/Waterford, Portlaoise and Rosslare and sits within an important rail corridor between Dublin and Kilkenny/Waterford. Carlow is a Level 1 Tier 3 centre in the national retail hierarchy, the level below the regional capitals of Cork, Galway, Limerick and Waterford, the same level as Newbridge and Portlaoise and the level above Athy, Kildare and Naas. It is, therefore, one of the most important centres in the national retail hierarchy and Athy's sub regional area.

5.3 Based on the preliminary results of the 2006 Census, between 1996 – 2006 Carlow Town and Environs witnessed population growth of the order of 18.7% which was below that of County Carlow but above that of the South East Region and the State. It was a level of growth significantly below that of Athy (49.4%) and its catchment area (25.8%) over the same period but is still illustrating strong growth. The 2004 South East Regional Planning Guidelines indicate that Carlow Town has significant potential for growth with a population of at least 28,000 being achievable by 2020 based on recent trends and capacity for growth.

5.4 In past ten or more years there has been a gradual shift of retail activity south eastwards from the traditional town centre because of the continued expansion of retail floorspace initiated by the urban renewal scheme of the early 1990s. Since the development of the Carlow Shopping Centre in the town centre (with the main anchor being Superquinn), two of the three main anchors of the Hanover Shopping Centre have closed and one has relocated to the Tesco anchored Fairgreen Shopping Centre, east of Barrack Street. The second phase of this new, large shopping centre has introduced a number of well known brand names such as Next and River Island to the town's offer. Other important new retail developments adjacent to the Fairgreen Shopping Centre and in the south east of the town include Aldi and the Hanover Retail Park. New Dunnes Stores and Aldi developments have recently opened in Graiguecullen, an area to the east of the town that falls within the County Laois administrative boundary. Both of these are likely to have attracted spend from the Athy catchment area. In contrast, there has been little large scale retail development in the town centre in recent years, apart from the refurbishment of the Shaws store.

5.5 At February 2005, the town and environs had an estimated total net floorspace of 32,873m^2, of which nearly 24% was convenience, 38.6% comparison and nearly 38.0% bulky goods. The proportion of bulky goods floorspace is high when compared with the majority of Level 1 Tier 3 centres in the national retail hierarchy. Analysis of floorspace figures has also revealed very high levels of vacancies within the traditional town centre. Following a period when new floorspace and planning permissions have been predominantly out of centre, permission has been granted for the Barrow Trails and there is an application recently submitted for the redevelopment and regeneration of the Hanover Shopping Centre within the zoned town centre area. Both of these would serve to consolidate and enhance the mainstream comparison offer of Carlow Town Centre and redress the issues which prevail. In addition to the Dunnes and Aldi developments, there is consent for further out of centre retail warehousing in Deerpark Business Centre and Carlow and Shamrock Business Parks. Recently, there have been major proposals put forward for the redevelopment and regeneration of the Greencore site with retail floorspace being an important component of the development strategy for the site.

5.6 Given the proximity of Carlow to Athy and the extent of existing and new floorspace in and around the town, it is reasonable to conclude that the leakage of retail expenditure (in particular comparison) from the Athy catchment area, which was identified in the 2004 household survey, will have continued to occur and is likely to have increased. Based on granted planning consents, then the total floorspace in the town and environs will grow to 81,156m^2 and the redevelopment of the Hanover shopping Centre, if granted, would increase this to of the order of 92,000m^2. The majority of the floorspace which has been granted is retail warehousing and it is unlikely that all of this will be delivered due saturation in this market sector. Mainstream comparison floorspace will total an estimated 31,000m^2 which is over three and a half time that which currently exists. In conclusion, the evidence is that over the next few years Carlow will see its comparison offer considerably improve and this is, thus, likely to increase the leakage of both convenience and comparison expenditure leakage from the catchment area.

KILDARE TOWN

5.7 Kildare is designated in the as an '*Urban Strengthening Opportunity*' in the NSS. The RPGGDA designate the town as a Hinterland Area Moderate Growth Town and, with Monasterevin, as the County's only Secondary Dynamic Cluster. These designations have been adopted into the CDP. It is not an identified centre within the national retail hierarchy but, as with Athy, with Monasterevin it is a GDA Hinterland Area Level 3 Sub County Town Centre. In addition to Athy, other Hinterland Area centres at this level in GDA retail hierarchy are Arklow, Ashbourne, Balbriggan, Kells and Trim. The CDP County Retail Hierarchy confirms Kildare Town at this level in the hierarchy but designates Monasterevin at a lower level.

5.8 The preliminary results of the 2006 Census do not enable the population of Kildare Town and Environs to be derived. However, between 1996 – 2002 its population increased by some 33.0% to 5,694 and, based on house building activity in the interim period to 2006, it is recognised that this high level of growth will have been sustained if not surpassed.

5.9 The Draft County Retail Strategy identifies that Kildare Town is the seventh largest retail centre in the County Kildare with a net retail floorspace of 3,025m^2. This comprised a predominance of comparison (38.2%) and retail warehousing/bulky goods floorspace (35.0%). Convenience floorspace only accounted for 22.7% of the total and is limited in both quality and quantum. The convenience floorspace in the new mixed use development on Claregate Street is small scale in respect to the needs of the town and its catchment area. As a result, people need to travel for main food shopping rather than it being available within the town itself. This position could be exacerbated by improved communications and the delivery of major new convenience floorspace in both Naas and Newbridge.

5.10 The nature of Kildare Town's comparison/bulky goods offer has meant that, at present, people in the town and its catchment area generally travelled to larger centres such as Naas, Newbridge, Dublin City Centre and the major shopping centres around the M50 (such as Liffey Valley and Blanchardstown) for middle and higher order comparison goods. However, in the interim, there has been the major addition of the recently opened 8,000m^2 Factory Outlet Centre (FOC) – the Kildare Village Outlet Centre – on the outskirts of the town at Greyabbey. It is only the third in the country and, in addition to significantly enhancing the comparison offer of the town, the FOC is already a major attractor of visitors and shoppers to Kildare Town and the County. Additionally, there is a planning application currently being considered for of the order of 14,000m^2 net of convenience and comparison floorspace on the Kildare

Entreprise Centre on the outskirts of the town and known emerging proposals for a Tesco superstore on a site adjacent to the FOC.

5.11 The 2002 Kildare Local Area Plan (LAP) confines retail/commercial zoning to around Claregate Street and the Market Square. There are no opportunities within this area that could accommodate the larger format convenience floorspace the town requires if it is to become more self sufficient and consolidate its role as a Sub County Town Centre. The plan zones a large area to the south west of the town centre for the expansion of Kildare Town Centre. This area is adjacent to the Kildare Village FOC and will be the subject of an Action Area Plan.

5.12 Kildare Town has grown in its retail attractiveness in recent years and the signs are that this is set to continue. Its improvement will have resulted in it becoming an additional attraction for comparison expenditure leakage from the Athy catchment area since the 2004 household survey. The new emerging proposals have the potential to reinforce this trend.

Naas

5.13 Naas forms part of the RPGGDA Hinterland Area Primary Dynamic Cluster comprising the town, Newbridge and Kilcullen and it is designated as the only Large Growth Town Type (1) 'Satellite Town' in the County in the guidelines. These designations have been adopted into the CDP. As with Athy, it is designated as a Level 2 Tier 3 centre in the national retail hierarchy which is the level below Carlow, Newbridge and Portlaoise. Within the GDA retail hierarchy, with Newbridge and Kilcullen, it is designated as a Level 2 Hinterland Area County Town Centre. Other centres at this level in the Hinterland Area are Navan and Wicklow and the Metropolitan Area Major Town Centres of Blanchardstown, Bray, Dundrum, Dun Laoghaire, Liffey Valley, Swords and Tallaght. In the County Retail Hierarchy, with Newbridge, Naas is designated as the Twin County Town Centre.

5.14 Naas is the administrative capital of Kildare, the County Town and the largest settlement in the County. In the period 1996 – 2002, the population of the town grew by just over 30.0% to 18,288. The preliminary results of the 2006 Census indicate that it has grown a further 9.4% over the past four years. This marks the transition from market town to one of the larger settlements in the GDA, largely due to the inflow of population from the Metropolitan Area. Based on residential zonings and densities, the Naas Town Council Development Plan states that the anticipated population of 22,000 would be reached by the end of the previous plan period if all allocated housing land was built out. The final results of the 2006 Census will confirm whether this position has been achieved or not.

5.15 While Naas is the largest town in the County, it has fallen behind Newbridge in its retail offer. The Draft County Retail Strategy identified it had a net retail floorspace of 10,344m[2]. This has increased by of the order of 25,000m² in the interim period with the opening of the Marks and Spencer *Simply Food* anchored Naas Town Centre scheme and two retail parks. Planning consent has been granted for a further 18,300m² of new floorspace comprising a 9,900m² town centre scheme (gross floorspace nearly 23,000m²) and an edge of town District Centre and retail park. The combination of these developments and consents will increase Naas' retail floorspace to 53,644m² over the period to 2011. In addition, a planning application for the neighbouring site to the District Centre is currently being considered by Naas Town Council and the County Council which would further increase total floorspace to approximately 59,000m². There remains recognition that Naas requires to continue to further enhance its retail offer if it is to sustain and enhance its attraction and competitiveness in the County and GDA retail hierarchies.

5.16 Currently, Naas is relatively poorly served by convenience floorspace. The two main stores, Tesco and Superquinn are of a poor quality format and this will be encouraging people to travel to other more modern stores elsewhere. The issue has been partially redressed with the Marks and Spencer *'Simply Food'* store and will be further addressed with the opening of the Tesco anchored Monread District Centre. Revised proposals for the granted Monread Road District Centre scheme were being evaluated by both the Town and County Councils at the time that this study was being prepared. It will make an important contribution to significantly redressing the town's convenience shopping deficiencies, a factor which has been recognised in the Board's decision to grant planning consent for the district centre.

5.17 Naas is renowned for its quality women's clothing and shoe shops which are recognised for drawing trade from the town's affluent hinterland and further a field. It, therefore, retains distinctiveness that is more akin to a market town than a major retail centre within the County and the GDA. The large gap in Naas' comparison shopping offer is the lack of national and international high street brands and department stores. This has been reinforced with the opening of the Debenham's and Marks and Spencer anchored Whitewater Shopping Centre in Newbridge. The 9,900m² net Corban's Lane development which has full planning permission will only partially serve to redress this. In addition to this scheme, Naas has the potential to see substantial improvement of its comparison retail within the heart of the town centre.

5.18 Naas' attractiveness to shoppers from the Athy catchment area can be anticipated to have decreased since the 2004 household survey was conducted in view of the intervening opportunities of the Kildare Village Outlet Centre and Whitewater Shopping Centre in Newbridge and the new floorspace which has been delivered in Carlow. However, it can be anticipated that the town's competitiveness will be enhanced to previous levels with further new floorspace coming forward.

NEWBRIDGE

5.19 The NSS identifies Newbridge as forming part of the Primary Dynamic Cluster comprising the town, Naas and Kilcullen and the RPGGDA designate it as the only Large Growth Town Type (2) in the County. These designations have been adopted into the CDP. As with Carlow and Portlaoise, Newbridge is a Level 1 Tier 3 centre in the national retail hierarchy and the level above both Athy and Naas. It is, thus, one of the most important centres in the national retail hierarchy and Athy's sub regional area. With Naas and Kilcullen, Newbridge is a GDA Hinterland Area Level 2 centre. Other centres at this level in the Hinterland Area are Navan and Wicklow and the Metropolitan Area Major Town Centres of Blanchardstown, Bray, Dundrum, Dun Laoghaire, Liffey Valley, Swords and Tallaght. In the County Retail Hierarchy, with Newbridge, Naas is designated as the Twin County Town Centre.

5.20 Between 1996 – 2002, the population of Newbridge grew significantly by over 25.0% to 16,739. Comparable data are not yet available from the preliminary results of the 2006 Census but it is recognised that growth has continued in the interim period between 2006 – 2006. This growth is set to continue with improvement of the town's attraction due to its proximity to the M7 motorway and the Dublin conurbation and location on the Dublin – Limerick/Cork main rail lines which provide both intercity and commuter services.

5.21 The Draft County Retail Strategy identifies that Newbridge is by far the largest retail centre in the County. The older shopping developments along Main Street are of poor and relatively limited – Newbridge and Ballymany Shopping Centres – particularly in comparison with the more recent Town Centre Square, Tesco Shopping Centre and Woodies developments, all of which have contributed to the improving retail offer of the town. This position has been significantly reinforced and enhanced with the introduction of the Debenham's and Marks and Spencer anchored Whitewater Shopping Centre. The current estimated total net floorspace of Newbridge is 39,039m^2. Based on the GDA Retail Strategy floorspace survey, in terms of other key centres in the GDA, Newbridge is now larger than Bray, Dun Laoghaire, Navan and Tallaght but smaller than Blanchardstown, Liffey Valley and Swords. There are, however, major emerging proposals for all of these centres – with the exception of Dun Laoghaire – and a suite of other centres including Dundrum and Maynooth and the new centres of Balgaddy, Cherrywood and Collinstown. This noted, Newbridge is recognised as one of the largest and most important centres outside of the Dublin conurbation.

5.22 Newbridge's attraction as a destination for the Athy catchment area for both convenience and comparison shopping is likely to have increased substantially since the 2004 household survey largely due to the attraction and offer of the Whitewater

Shopping Centre. There is considerable scope for further additional retail floorspace within the town centre which will continue to attract expenditure leakage from the catchment area.

PORTLAOISE

5.23 Portlaoise is designated in the NSS as a County Town, an '*Urban Strengthening Opportunity*' and an '*inland distribution port*' of national significance. It is also designated as a 'Principle Town' in the MRPG. As has been highlighted, Portlaoise – with Carlow and Newbridge – is designated as a Level 1 Tier 3 centre in the national retail hierarchy and is, therefore, one of the most important centres in the country and in the Athy sub region. The 2003 county retail strategy identifies that it is the key centre in the county which is equipped to compete against other towns in the Midland Region.

5.24 The preliminary results of the 2006 Census indicate that between 1996 – 2006 Portlaoise has grown by a significant 73.9% to XXXX. The majority of this increase (41.8%) was over the period 1996 – 2002 but the 23% growth since 2002 is still substantial. Growth can be attributed to strong net in-migration, the higher rate of household formation and pressure from the GDA.

5.25 The county retail strategy estimated the net retail floorspace of the town to be 22,363m^2 in 2003, with 38% comprising convenience floorspace and 62% comparison. There is no breakdown of what component of comparison floorspace is bulky goods floorspace. The strategy recommends a study to investigate the potential of expanding the town northwards to counter the movement of shopping floorspace to the Laois Shopping Centre. Additionally, the Draft LAP for Portlaoise sets out a priority to develop retail warehousing and distribution amongst other uses at the Portlaoise Interchange in the Togher area of the town.

5.26 The Main Street in Portlaoise is the traditional shopping heart of the town. In more recent years, three shopping centres have been built. The largest of these is the Laois Shopping Centre, which is just south of and linked to the town centre via pedestrian overpass across the busy James Fintan Lalor Avenue. This centre is fairly new and in good condition (built in the 1990s). It is anchored by Tesco with other operators including Penneys, Lidl and 4Home. The county retail strategy suggests the shopping centre has displaced the town centre as the main focus for shopping and emerging proposals are likely to reinforce this. The other two shopping centres are located at distance to the west of the town centre and both are in need of investment.

5.27 Convenience needs are met by a mix of national and international multiples located in both town centre and out of centre locations and smaller independent businesses.

The main operators are Dunnes, Tesco and Lidl. Shaws and Penneys are the main comparison stores in the town centre and there is also an out of centre Shaws. There is retail warehousing on the Kea Lew Business Park, off the Mountrath Road.

5.28 In comparison to many other Level 1 Tier 3 centres in the national retail hierarchy, Portlaoise is underperforming in its role, profile and attraction and it can be anticipated that there is leakage to other centres including Carlow and Newbridge. This is recognised in the county retail strategy which identifies considerable capacity for additional convenience and comparison floorspace with this being delivered by the consolidation/improvement of the existing shopping centres and implementation of the suite of retail warehousing permissions which are in the pipeline. These include the permissions for the Clonminam Industrial Estate and Timahoe Road which relate to the overall Portlaoise Interchange proposals. There are also large proposals for Kylekiproe Road that are associated with expanding retail uses adjacent to the Laois Shopping Centre.

5.29 From the review, it would appear that Portlaoise competes with the Athy catchment area to a lesser extent than the other identified competing centres, given its relative lack of national and international comparison multiples and distance from the town and its catchment area. However, the proposals for enhanced retail warehousing floorspace do have the potential for increasing comparison expenditure leakage from the Athy catchment area in the longer term.

Conclusions

5.30 The review of the competing centres has identified that all are growing significantly in population and in the quantum and quality of their retail offers, possibly with the exception of Portlaoise in respect of the latter. The important finding is confirmation of the additional floorspace which has been introduced since the 2004 household survey was undertaken. These developments will have attracted comparison expenditure leakage from the catchment area. However, the unknown is whether this is additional expenditure leakage or a diversion of spend which was already leaking – essentially – are these centres diverting spend which was already leaking to the Dublin conurbation or is it additional expenditure leakage. This cannot be answered without a new household survey but it is likely that it is a mix of both with a residual increase in expenditure leakage from the catchment area. This position is not set to remain static, all of the competing centres have proposals in the pipeline for substantial amounts of new floorspace. These will reinforce the leakage which prevails unless there is a significant quantitative and qualitative response in the delivery of new convenience and comparison floorspace in Athy and particularly but not solely the latter.