

Appendix 2

Wicklow County Council Housing & Retail Strategy



APPENDIX 2 WICKLOW COUNTY HOUSING STRATEGY

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1. Introduction

Statutory Background

This document sets out Wicklow's Housing Strategy for the period 2010 – 2016, which is the lifetime of the new Wicklow County Development Plan.

The preparation of a Housing Strategy is a requirement under the Planning and Development Acts 2000-2006. Section 94 of the Act requires that each Planning Authority shall include in any development plan it makes a strategy for the purpose of ensuring that the proper planning and sustainable development of the area of the development plan provides for the housing of the existing and future population of the area in the manner set out in the strategy. The Housing Strategy must include an analysis of demand and supply for the different sectors of the housing market, forecast future needs and shortfalls and propose objectives to balance demand with supply in a sustainable manner.

In accordance with Section 94(1)(e) of the Act, this housing strategy has been prepared as a joint strategy between Wicklow County Council, Bray Town Council, Wicklow Town Council and Arklow Town Council. Reference to the "planning authority" or "housing authority" throughout this document should be read as a reference to the four local authorities in the County.

The procedures for the preparation of a Housing Strategy are set down in the Act. In particular, the Act specifies that the Housing Strategy will:-

- Estimate the existing and likely future need for housing in the area, and ensure that sufficient zoned and serviced land is made available to meet such needs;
- Ensure that housing is available for persons who have different levels of income;
- Ensure that a mixture of house types and sizes is developed to reasonably match the requirements of the different categories of households, including the special requirements of elderly persons and persons with disabilities;
- Counteract undue segregation between persons of different social backgrounds;
- Provide that as a general policy a specific % (not exceeding 20%) of the land zoned in the Development Plan for residential use, or for a mixture of residential and other uses, shall be reserved for those in need of social or affordable housing in the area.

Thus the Housing Strategy encompasses both the role of the Authority as the provider of social and special housing and its broader land use planning responsibilities.

Context

In the drafting of this Housing Strategy, regard was had of the following national, regional and local documents:

- National Spatial Strategy 2002-2020 (NSS)
- National Development Plan 2007-2013
- Regional Planning Guidelines for the Greater Dublin Area 2004-2016
- The Planning Acts 2000-2006
- Part V of the Planning and Development Act 2000 – Guidelines for Planning Authorities (DoEHLG 2000)
- The previous Wicklow Housing Strategy 2004-2010
- Wicklow Local Area and Town Plans

1.3 Review of the previous Housing Strategy

The 2004-2010 Housing Strategy comprised four principal elements:

- To ensure that sufficient zoned and serviced land is available in designated development centres and other settlements within the County to accommodate the estimated housing requirements of such settlements during the currency of the Plan;
- To require that 20% of any land developed for residential use or for a mixture of residential and other uses be provided for social and affordable housing (this includes lands that come within the remit of Part V and unzoned lands);
- To implement Part V of the Planning and Development Acts 2000-2006 and in particular, 20% of any land developed for residential use or for a mixture of residential and other uses shall be made available for the provision of social / affordable housing;
- To provide directly for social and affordable housing solutions through its own house building programme, assistance to other agencies and individuals, acquisition of dwellings and other special programmes.

In these regards:

- Local Area Plans and Town Plans have been adopted for all significant settlements in the County¹, all of which have included sufficient zoned residential lands (with an additional 'headroom' of 30%-50%) to meet the needs of the existing and future population of that settlement (in accordance with the population targets and settlement strategy set out in the 2004 County Development Plan). The servicing of these residential lands has been prioritised by Wicklow Local Authorities in the services investment programmes;
- All new housing developments on unzoned lands that fall outside Part V requirements but fall within the existing policy requiring delivery of social / affordable units have been required to deliver 20% of the development for affordable housing;
- All new housing developments that fall within Part V requirements have been required to designate 20% of the development for social and affordable housing;
- The Local Authority house building and acquisition programme has continued to deliver new social and affordable units

During the 4-year period 2005-2008, a total of 983 units (718 Social Rented Units and 265 Affordable Units) have been delivered through construction and acquisition by Wicklow Local Authorities and Part V.

1.4 Approach

The approach to this task depends on a number of factors. Availability of relevant data is a major consideration in determining the precision and reliability of any analysis. Equally, the depth of the analysis depends on methods currently adopted for assessing "social" housing needs within the County. The structure of the analysis however is flexible and allows for the introduction of new or updated information that may become available during the course of implementation. Such flexibility will be required over the life of the development plan in order to take account of changing circumstances.

The approach adopted is summarised below:

- Project the number of expected household formations in the County for the period from 2010-2016. This involves an analysis of population growth and trends in household size. Together these factors are combined to generate a forecast of household numbers over the life of the development plan. This analysis culminates in the data presented in Table 2.2D;

¹ Other than Blessington

- Project the levels and distribution of household disposable incomes across these households over the period in question. This involves the application of available national income data to Wicklow and the characterisation of different income groupings across households within the County. This analysis culminates in the data presented in Table 3.2C;
- Assess housing affordability in the County over the period, based on the income projections made. This analysis is set out in Table 4.0A;
- Project the levels and distributions of house prices over the period (Section 5). A distribution of house price bands is then constructed which is matched up with the above-mentioned affordability bands. This analysis culminates in the data presented in Section 6 – Conclusions.

1.5 Methodology and data sources

In preparing the strategy, reference was made the following guidelines and data sets:-

- Department of the Environment, Heritage and Local Government guidelines – “Part V of the Planning and Development Act 2000 – Housing Supply – A Model Housing Strategy and step-by-step guide”, December 2000;
- CSO Census data;
- Department of the Environment, Heritage and Local Government and CSO regional population projections ;
- Department of the Environment, Heritage and Local Government data on house completions;
- CSO income data;
- House price data from the Permanent/TSB's Index of House Prices. This index is based on monthly mortgage sales in the Republic of Ireland which allows the company to compile comprehensive representative data on house prices and their movement. Permanent /TSB has a market share greater than one-fifth of residential lending. This Index has been developed in conjunction with the Economic and Social Research Institute (ESRI);
- Research commissioned by Wicklow County Council and carried out by Mary Doyle of HJByrne Valuers and Surveyors on house sales in County Wicklow in 2007.

Where data was available on a national basis only, enabling assumptions were necessarily made regarding how - if at all - the position in Wicklow departed from national trends. In all cases where standard national projections (either in population, incomes or prices) were used, care was taken to make whatever adjustment might render the data-set more appropriate to the particular circumstances of Wicklow. Notwithstanding this issue of the application of (adjusted) national data to the County specific context, a principal concern throughout the preparation of this strategy has been that all available data-sets should be identified and accessed, and that any inference or interpretation drawn from that data should be clearly stated, well reasoned, and well founded.

In relation to house price data in particular, the Planning Authority has constructed its own forecasts of house price trends. Due to the instability and fluctuations in the economy and the housing market at the time of drafting this strategy, it is not possible to source predictions upon which there is consensus. Therefore a number of different forecasts are made, but in order to make the analysis robust, the ‘best case’ scenario (in terms of housing affordability) is utilised for the analysis.

Furthermore, the most recent forecasts with regard to the growth of disposable income from the ESRI are now outdated (May 2008). There are no other verifiable or robust sources available and

predictions have been made by the Planning Authority. . Again, a number of scenarios are postulated, and the 'best case' position is used for analysis.

2. Estimating housing demand

2.1 Population Trends

County Wicklow is located in the most rapidly growing region in Ireland today (Mid-East Region comprising the Counties of Kildare, Meath and Wicklow). However, the rate of population growth in the County has not kept pace with other counties in the region. Its population has increased from 114,676 in 2002 to 126,196 in 2006, an increase of just under 11,654 people (Table 2.1A). This equates to a growth rate of 10.04%. This rate of growth is significantly below the growth rate in the other counties in the region as shown in Table 2.1B.

Table 2.1A: Population 1991-2006

Year	Population	% change
1991	97, 265	
1996	102,683	5.6%
2002	114,676	11.7%
2006	126, 196	10.04%

Source: CSO Census of Population 1991, 1996, 2002, 2006

Table 2.1B: Growth rates in GDA 2002-2006

County	% change
Region	15.2%
Kildare	13.7%
Meath	21.5%
Wicklow	10%

Source: CSO Census of Population 2002, 2006

An analysis in the pattern of change in the age structure of the County since 1996 shows that there has been a decline of persons in the 0-24 age group in the County from 42% in 1996 to 36% in 2006. This is likely to have an impact on the rate of 'indigenous' household formation over the strategy. There is also a trend towards a greater proportion of the County's population in the older cohorts (55 years+).

Table 2.1C. Percentage of Persons in each Age Group, 2006

Year	0-14	15-24	25-39	40-54	55-64	65+
2006	22%	14%	24%	20%	10%	10%
2002	23%	15%	23%	20%	9%	10%
1996	25%	17%	22%	19%	8%	10%

Source: CSO Census of Population 1996, 2002, 2006

The breakdown of the household structure can be summarised as one person, two or more family units, non-family households, two or more non-related persons, couples with no children and couples with children, and lone parents with children.

In Wicklow the number of family units comprising couples (married / cohabitating) with children has remained constant at 41% - 42% between 2002 and 2006. Interestingly, while the proportion of households in the State with 3 or more persons has decreased between 2002 and 2006 (from 53% to 51%), the number of 3+ households in Wicklow has increase over the same period from 44% to 48%.

Table 2.1D. Percentage of Persons in each Age Group, Co. Wicklow 2006

Household composition	2002	2006
1 person household	18%	19%
Husband and wife	14%	15%
Cohabiting couple	4%	5%
Husband and wife with children (any age)	39%	35%
Cohabiting couple with children (any age)	3%	6%
Lone mother	9%	10%
Lone father	1.5%	2%
Other	11.5%	8%

Source: CSO Census of Population 2006

The demographic trends in the County have implications for the Housing Strategy. Clearly there is a requirement to ensure the provision of additional housing to meet the forecast demand and in Wicklow, given the high proportion in the 25-39 range and the high proportion of households with 3 or more persons, it would appear that the housing strategy will need to focus on the 1st time buyers, particularly those with young / expanding families. While household sizes overall will be falling over the strategy period, this is largely attributed to 'empty nesters' rather than falling fertility amongst those in the 25-39 age group. This will require a policy approach that favours the development of medium sized units (2-4 bedrooms).

2.2 Household Growth/Household Size

There has been a strong rate of household growth in County Wicklow between 1996 and 2006, with both intercensal periods showing an increase of around 17%.

Table 2.2 A. Number of households and household size, Co. Wicklow

Year	1996		2002		2006	
	Number of households	Average household size	Number of households	Average household size	Number of households	Average household size
	31,134	3.22	36,572	3.06	42,870	2.89
increase			+6,298		+5,438	
% increase			+17.2%		+17.5%	

Source: CSO Census of Population 1996, 2002, 2006

The Central Statistics Office published new projections for national population growth in April 2008 and regional population growth in December 2008. These publications outline a number of growth scenarios up to 2026, making different assumption about fertility, mortality and international migration. A total of eight different scenarios are identified in the national projections and four scenarios for the regional projections, with the total population projected in the mid-east region up to 2021 ranging from 629,000 to 746,000 (from 475,362 in 2006).

These **projections** were evaluated by the Spatial Policy Unit of the Department of the Environment, Heritage and Local Government, which published new regional **targets** in January 2009. It is important to note that the CSO projections do not take account of NSS policy, which aims to achieve more a more balanced growth across the Country through coordinated implementation of NSS principles. Therefore the regional population targets set out in the DoEHLG's document are based on a view of future development trends which are significantly influenced and driven by the NSS and thus differ in concept and practice from the CSO projections. Furthermore, the DoEHLG regional targets differ from the CSO projections in that they set out population breakdowns at 2010, 2016 and 2022. These dates are in line with the 6-yearly cycle for the review of the RPGs.

Table 2.2B: DoEHLG Regional Population Targets 2010, 2016 and 2022

	2008	2010	2016	2022 (low / high range)
Border	492,500	511,000	552,700	595,000 - 611,400
Dublin	1,217,800	1,256,900	1,361,200	1,464,200 - 1,504,500
Mid-east	514,500	540,000	594,600	639,700 - 657,200
Midland	266,800	275,600	297,300	317,100 - 325,800
Mid-west	371,900	383,800	427,200	462,300 - 475,000
South-east	487,800	507,900	542,200	580,500 - 596,500
South-west	644,600	667,500	737,100	795,000 - 816,900
West	426,100	442,200	484,700	521,400 - 535,700
State	4,422,000	4,584,900	4,997,000	5,375,200 - 5,523,000

Source: Department of the Environment, Heritage and Local Government, 2009

The distribution of this population target across the three mid-east region counties will be determined in the new RPGs for the GDA, that will not be published until 2010. However the draft RPGs will be on display during 2009 and will give a strong indication of how this population will be distributed, but these figures are not available for this draft Strategy.

This draft Strategy must therefore be framed in the absence of these final allocations. It is assumed however that the RPG strategy will endeavour to redress the population imbalance between Wicklow and the other counties in the mid-east region and attempt to increase Wicklow's share in the region's population. In this regard, population projections in this draft plan are based Wicklow's share in the region's population returning to 2002 levels by 2016 (27.8%) and increasing further to 28.8% by 2022.

As it is an overriding aim of the County Development Plan and Housing Strategy to be consistent with the RPGs, it is intended to update this strategy during the adoption process to incorporate the RPG figures when they are available.

Table 2.2C: Wicklow Population Targets 2016 and 2022

Year	2002	2006	2016	2022 (low / high)
Mid-east	412,625	475,362	594,600	639,700 - 657,200
Wicklow	114,676	126,196	165,299	184,234 – 189,274
% share	27.8%	26.5%	27.8%	28.8%

Table 2.2D: Population projections and projected growth in households 2006-2016

Year	Population	Total population in private households ²	Average household size	Number of private households	% increase	Number of new households to be formed per annum	Number of additional housing units required ³
2006	126,196	123,670	2.89	42,870			
2007	128,693	126,119	2.86	44,098	2.9%	1,228	1,301
2008	131,192	128,568	2.83	45,430	3.0%	1,333	1,413
2009	133,691	131,017	2.79	46,960	3.4%	1,529	1,621
2010	136,190	133,466	2.76	48,357	3.0%	1,398	1,482
2011	138,691	135,917	2.73	49,787	3.0%	1,429	1,515
2012	144,013	141,132	2.69	52,466	5.4%	2,679	2,840
2013	149,334	146,348	2.66	55,018	4.9%	2,552	2,705
2014	154,656	151,563	2.63	57,628	4.7%	2,611	2,767
2015	159,977	156,778	2.59	60,532	5.0%	2,904	3,078
2016	165,299	161,993	2.56	63,279	4.5%	2,747	2,911

Note: Population projections 2010-2016 are from the Wicklow County Development Plan 2010-2016

3. Household Incomes

Income levels are a key determinant of affordability, as set out in Section 93(1) of the Act. Income distribution (i.e. the proportion of households in certain income groups), rather than average income is utilised as it allows more meaningful comparisons to house prices. The income distribution for Wicklow was developed as follows:

- The CSO Household Budget Survey for 2004/2005 (which is undertaken every 5 years) was used to find a national household income distribution;
- This distribution was then adjusted on the basis of assumptions made about the gap between Wicklow and national levels of household income;
- The derived income distribution was inflated / deflated by assumed rates of household income growth up to 2016. The 2005 data was inflated up to 2007 using CSO / ESRI data. Thereafter projections / predictions are required, which are made by Wicklow County Council Forward Planning Section.

² The Census reveals that c. 2% of the enumerated population on the date of the census is not resident in a private household in the County. This allows for visitors, hotel guest, those in hospitals, nursing homes etc on the census date.

³ The number of housing units required will be slightly above the number of new households formed due to the 'excess factor' which is a term describing the fact that demand for housing will exceed actual household formation due to some of the additional units being required to replace obsolete housing, some units being vacant at any one time due to market frictional factors or some units being second homes or pieds à terre.

3.1 Estimated distribution of household disposal incomes

Table 3.1A: Estimated distribution of household disposal incomes in Wicklow 2005

Income range	Weekly disposable income (national) €	Average weekly disposable income (national) €	% of households in each decile	Average annual household disposable income (national) ⁴	Wicklow deflator (see Table 3.2B below)	Average annual household disposal household income Wicklow	No. of households in Wicklow, 2005 ⁵
1 st decile	<190.37	158.99	9.99	8,267.48	1.0	8,267.48	4,120
2 nd decile	<312.23	244.65	10.0	12,721.80	1.0	12,721.80	4,124
3 rd decile	<433.20	359.12	9.98	18,674.24	1.0	18,674.24	4,116
4 th decile	<598.88	488.30	9.98	25,391.60	1.0	25,391.60	4,116
5 th decile	<777.00	628.31	9.99	32,672.12	1.0	32,672.12	4,120
6 th decile	<981.00	779.53	9.99	40,535.56	1.0	40,535.56	4,120
7 th decile	<1227.43	950.84	10.0	49,442.68	1.0	49,442.68	4,124
8 th decile	<1524.67	1,167.54	9.99	60,712.08	1.0	60,712.08	4,120
9 th decile	<2019.06	1,420.76	10.0	73,879.52	1.0	73,879.52	4,124
10 th decile	>2019.06	2,232.01	9.99	116,064.52	1.0	116,064.52	4,120
Total			100				41,245

Source: CSO Household Budget Survey 2004-2005

Table 3.1B: National, Region and County – Estimate of Disposal Income (€) 2000-2005

Area	2000	2001	2002	2003	2004	2005
State	13,977	15,841	17,088	18,295	18,906	20,164
Region (mid-east)	14,058	16,077	17,459	18,570	19,221	20,422
Wicklow	13,512	15,568	17,373	18,658	19,147	20,187
Wicklow (% of state)	96.7%	98.3%	101.7%	102%	101.3%	100.1%
Wicklow Average 2000-2005						100.02%

Source: County Income and Regional GDP, CSO Feb 2008

3.2 Household income projections

The most recent projections for personal disposable income available from the ESRI were made in their medium-term review published in May 2008 (projections up to 2015). At that time, it was predicted that personal disposable income would continue to rise at the following rates:

Table 3.2A: ESRI Personal Income 2008-2015

Year	2008	2009	2010	2011	2012	2013	2014	2015
% annual increase	5.5%	5.1%	2.5%	6.3%	6.0%	6.6%	6.7%	6.7%

Source: ESRI Medium Term Review, May 2008

As the economic climate has worsened somewhat since May 2008, alternative scenarios for the growth / decline in disposable have been considered for this strategy. All scenarios consider a situation where disposable income decline in the short term, to reflect the impact on household incomes of jobs losses, wage cuts and additional taxes and levies, all of which have escalated since late 2008.

⁴ Weekly income * 52

⁵ Total County population in 2005 estimated as 123,315 (based on 2002 and 2006 census). On average, 2% of total population is not in private household = 120,849. Av household size in 2005 = 2.93 (based on 2002 and 2006 census). Total no. of private households in 2005 = 41,245

In this regard, the following three scenarios were considered

Scenario 1 Economic Recovery

In this scenario there will be a significant retraction in the economy in 2009, continuing to a lesser extent in 2010 and a return to strong growth in 2010, up to 2015.

Scenario 2 Prolonged Recession

In this scenario there will again be a significant retraction in the economy in 2009, continuing in 2010 and a return to moderate growth in 2011, up to 2015.

Scenario 3 Worst Case Scenario

In this scenario there will be a continued retraction in the economy throughout 2009, 2010 and 2011 and a slow return to growth in 2012

Table 3.2B: Scenarios for the % growth / retraction in household incomes 2008-2016

	2008	2009	2010	2011	2012	2013	2014	2015	2016
Economic Recovery	-3.0	-8.0	-1.0	5.0	5.0	5.0	5.0	5.0	5.0
Prolonged Recession	-3.0	-8.0	-3.0	3.0	3.5	4.0	4.5	5.0	5.0
Worst Case Scenario	-3.0	-8.0	-5.0	0	1.0	2.0	3.0	4.0	5.0

As the principle function of this strategy is to determine if it will be necessary for the Local Authority to intervene in the housing market and require developers to dedicate lands / units for social and/or affordable housing, this strategy would be most defensible if a situation were considered where incomes recover but house prices stay low, as this would give the least justification for seeking the maximum 20% social and affordable housing.

Therefore the '*economic recovery*' scenario as set out above has been utilised in predicting incomes up to 2016.

Table 3.2C: Projected Household Income Distribution Wicklow 2005-2016 (€)

Year	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
% change		+7.7	+9.9	-3.0	-8.0	-1.0	+5.0	+5.0	+5.0	+5.0	+5.0	+5.0
1st decile	8,267	8,904	9,785	9,491	8,732	8,645	9,077	9,531	10,007	10,508	11,033	11,585
2nd decile	12,722	13,702	15,058	14,606	13,438	13,303	13,969	14,667	15,400	16,170	16,979	17,828
3rd decile	18,674	20,112	22,103	21,440	19,725	19,527	20,504	21,529	22,605	23,736	24,923	26,169
4th decile	25,392	27,347	30,055	29,153	26,821	26,552	27,880	29,274	30,738	32,275	33,888	35,583
5th decile	32,672	35,188	38,671	37,511	34,510	34,165	35,873	37,667	39,550	41,528	43,604	45,785
6th decile	40,536	43,657	47,979	46,540	42,817	42,389	44,508	46,733	49,070	51,524	54,100	56,805
7th decile	49,443	53,250	58,522	56,766	52,225	51,703	54,288	57,002	59,852	62,845	65,987	69,287
8th decile	60,712	65,387	71,860	69,704	64,128	63,487	66,661	69,994	73,494	77,168	81,027	85,078
9th decile	73,880	79,569	87,446	84,823	78,037	77,257	81,119	85,175	89,434	93,906	98,601	103,531
10th decile	116,065	125,002	137,377	133,256	122,595	121,369	127,438	133,810	140,500	147,525	154,902	162,647

4. Affordability Analysis

Using the above forecast for disposable incomes and the 'annuity formula' set out in the Part V guidance, it is possible to project the value of a house that the various cohorts of the population will be able to afford (adhering to the requirement that they do not expend greater than 35% of disposable income on mortgage costs). The methodology involves taking the annual disposable income (across the 10 deciles) and applying a formula (see below) that makes assumptions about the Loan-To-Value ratio (90% in this instance), term of loan (25 years) and interest rate (5% in this instance). It is possible to arrive at the maximum value of a property that an individual at this income band can afford.

Table 4.0A: Maximum affordable house prices by disposable income band

Decile	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
1st	45,765	49,289	54,168	52,543	48,340	47,857	50,249	52,762	55,400	58,170	61,078	64,132
2nd	70,427	75,850	83,359	80,859	74,390	73,646	77,328	81,195	85,254	89,517	93,993	98,693
3rd	103,377	111,337	122,359	118,688	109,193	108,101	113,506	119,182	125,141	131,398	137,968	144,866
4th	140,567	151,390	166,378	161,387	148,476	146,991	154,340	162,057	170,160	178,668	187,602	196,982
5th	180,868	194,794	214,079	207,657	191,044	189,134	198,590	208,520	218,946	229,893	241,388	253,457
6th	224,402	241,681	265,607	257,639	237,028	234,657	246,390	258,710	271,645	285,228	299,489	314,463
7th	273,710	294,785	323,969	314,250	289,110	286,219	300,530	315,556	331,334	347,901	365,296	383,561
8th	336,093	361,972	397,808	385,873	355,004	351,454	369,026	387,478	406,851	427,194	448,554	470,981
9th	408,989	440,482	484,089	469,567	432,001	427,681	449,065	471,519	495,095	519,849	545,842	573,134
10th	642,520	691,994	760,501	737,686	678,671	671,885	705,479	740,753	777,790	816,680	857,514	900,390

The annuity formula used:

$$PV = Pt \left[\frac{1 - (1+i)^{-n}}{i} \right]$$

where PV = total loan size (no greater than 90% of Market Value - Section 93(1))

Pt = monthly repayment amount

i = monthly interest rate

n = number of months over which the loan is to be paid

5. House Prices

Given the measure of affordability now established for Wicklow over the strategy period, the remaining element required to complete the assessment of social and affordable housing need in the County is to make some estimate of the prices at which new housing will be introduced over the life of the strategy.

The market for housing remained buoyant both nationally and in the 'commuter' counties of Wicklow, Meath and Kildare throughout 2004, 2005 and 2006. However, a severe adjustment in the market has taken place throughout 2007, 2008 and 2009, with the year-on-year index of prices showing a reduction in prices in the commuter belt of 6.6% between December 2006 and December 2007 and of 16.8% between December 2007 and December 2008 (Source: TSB / ESRI House Price Index).

There is no official data on house prices at County level post 2006, when the TSB/ESRI report changed format. However, it is possible to determine the relationship between Wicklow and Dublin prices and Wicklow and 'Commuter Belt' prices pre 2006 and assuming this relationship stays reasonably constant, use it moving forward to 2016.

In this regard, house prices in Wicklow pre-2006 were around 15% higher than the average in the 'Commuter Belt' and 10% lower than the average in Dublin. Wicklow prices and changes in Wicklow prices appear to follow Dublin prices more closely than 'Commuter Belt' prices, possibly due to Wicklow's relative attractiveness as a place to live and the lower number of new houses available in Wicklow compared to Meath, Kildare and Louth.

The reduction in prices in Wicklow is estimated at 4.2% between 2006-2007 and 12.4% between 2007-2008 (while the average fall in the 'Commuter Belt' was 16.8% between 2007-2008). The average house price in Wicklow end 2008 is estimated to be around €326,115 down from the 2006 average of around €388,800.

The task of predicting future price trends as a means of estimating affordability is fraught with difficulties. While house prices have been in constant decline since 2006, any predictions about how far prices will fall and for how long are, by their nature, uncertain.

Therefore again a number of scenarios have been considered

Scenario 1 In this scenario, house prices are predicted to continue to fall until 2010 (fall of 12% in 2008 and 8% in 2009) with a trough in the 1st quarter of 2010. From 2010 a gradual return to house price growth is predicted, with modest gains of 2% pa until 2013 and slightly stronger growth thereafter.

Average house price Wicklow Scenario 1															
Year	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
% change		10	9	11	12	-4.2	-12.4	-8.1	1.9	1.7	2.4	2.9	4.0	5.0	5.0
	261,773	287,801	313,547	347,158	388,827	372,424	326,115	299,760	305,436	310,780	318,247	327,440	340,434	357,388	375,250

Scenario 2 In this scenario, house prices will continue to fall until 2012 (fall of 12% in 2008, 10% in 2009, 8% in 2010, 6% in 2011) where there will be a period of stagnation and return to growth only in 2014.

Average house price Wicklow Scenario 2															
Year	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
% change		10	9	11	12	-4.2	-12.4	-10	-8	-6	0	0	1	2	3
	261,773	287,801	313,547	347,158	388,827	372,424	326,115	293,504	270,024	253,823	253,823	253,823	256,361	261,488	269,333

This data does not however allow a meaningful assessment of affordability by comparison to the 'affordability' analysis set out in Part 4 of this report. In this regard, in accordance with the guidance set out in *Part V of the Planning and Development Act, 2000 – Housing Supply – A Model Strategy and Step by Step Guide (DoEHLG 2000)*, data has been collected on the number of houses that are available in price *bands*, that is, the number of houses that are available in the market within certain price ranges. The baseline data for this analysis is from 2007, the last year in which there was enough activity in the Wicklow housing market to get a meaningful breakdown on the range of houses coming to the market.

Table 5.0A: Proportion of houses in each price band in 2007

Price band (000's €)	100-200	200-300	300-400	400-500	500-600	600-700	700-800	800-900	900-1m	1m+
% of Wicklow units in each band	0.30%	9.4%	33%	30.6%	11.2%	7.0%	2.5%	1.0%	1.6%	3.5%

Source: Survey by HJByrne Auctioneers commissioned by Wicklow County Council

It is then necessary to inflate / deflate these bands according to predictions of house price change. It is assumed that the proportion of houses in each band remains constant

Tables 5.0B and C: House price band inflation

Table 5.0B: Scenario 1

Year	Average price increase %	Price band									
2007		100-200	200-300	300-400	400-500	500-600	600-700	700-800	800-900	900-1m	1m+
2008	-12	88-176	176-264	264-352	352-440	440-528	528-616	616-704	704-792	792-880	880+
2009	-8	81-162	162-243	243-324	324-405	405-486	486-567	567-648	648-729	729-810	810+
2010	2	83-165	165-248	248-330	330-413	413-496	496-578	578-661	661-744	744-826	826+
2011	2	85-168	168-253	253-337	337-421	421-506	506-590	590-674	674-759	759-843	843+
2012	2	87-171	171-258	258-344	344-429	429-516	516-602	602-687	687-774	774-860	860+
2013	3	90-176	176-266	266-354	354-442	442-531	531-620	620-708	708-797	797-886	886+
2014	4	94-183	183-274	274-368	368-460	460-552	552-645	645-736	736-829	829-921	921+
2015	5	99-192	192-288	288-386	386-483	483-580	580-677	677-773	773-870	870-967	967+
2016	5	104-202	202-302	302-405	405-507	507-609	609-711	711-812	812-914	914-1,015	1,015+
% of Wicklow units in each band		0.30%	9.4%	33%	30.6%	11.2%	7.0%	2.5%	1.0%	1.6%	3.5%

Table 5.0C: Scenario 2

Year	Average price increase %	Price band									
2007		100-200	200-300	300-400	400-500	500-600	600-700	700-800	800-900	900-1m	1m+
2008	-12	88-176	176-264	264-352	352-440	440-528	528-616	616-704	704-792	792-880	880+
2009	-10	79-158	158-238	238-317	317-396	396-475	475-554	554-634	634-713	713-792	792+
2010	-8	73-145	145-219	219-292	292-364	364-437	437-510	510-583	583-656	656-729	729+
2011	-6	69-136	136-206	206-274	274-342	342-411	411-479	479-548	548-617	617-723	723+
2012	0	69-136	136-206	206-274	274-342	342-411	411-479	479-548	548-617	617-723	723+
2013	0	69-136	136-206	206-274	274-342	342-411	411-479	479-548	548-617	617-723	723+
2014	1	70-137	137-208	208-277	277-345	345-415	415-484	484-553	553-623	623-730	730+
2015	2	71-140	140-212	212-283	283-352	352-423	423-494	494-564	564-635	635-745	745+
2016	3	73-144	144-218	218-291	291-363	363-436	436-509	509-581	581-654	654-767	767+
% of Wicklow units in each band		0.30%	9.4%	33%	30.6%	11.2%	7.0%	2.5%	1.0%	1.6%	3.5%

6. Conclusions

Affordability for each year of the strategy is set out to follow. The purpose of this analysis is to determine what proportion of new private housing the Housing Strategy will require to be devoted to social and affordable housing. As the labour and housing markets are not operating efficiently at the present time, making predictions even for the short term is difficult, calculations are based on a scenario where house prices are weakest (Scenario 2 - Table 5.0C above) and incomes are strongest (Economic Recovery Scenario – Table 4.0A). In this situation, the justification for taking the maximum proportion of Social and Affordable houses allowed (20%) would be weakest. Using such a combination to base calculations on would not normally be justifiable, however, in the current uncertain markets it is considered to be the most robust methodology.

6.1 Affordability Index 2010

1,482 new housing units are required to be provided in 2010. Assuming the house prices continue to fall in accordance with Scenario 2 set out in Section 5 above, these will be provided at the following price ranges:

Price band	73-145	145-219	219-292	292-364	364-437	437-510	510-583	583-656	656-729	729+
No. of units provided	4	139	489	453	166	104	37	15	24	52

Assuming that incomes recover along the lines of the 'Economic Recovery' scenario as set out in Section 3.2 above, affordability will be as follows:

Income decile	No. of houses required in each decile	Affordable house price
1st decile	148	47,857
2nd decile	148	73,646
3rd decile	148	108,101
4th decile	148	146,991
5th decile	148	189,134
6th decile	148	234,657
7th decile	148	286,219
8th decile	148	351,454
9th decile	148	427,681
10th decile	148	671,885

There are 4 houses in the house price distribution table above under €145,000. A total of 444 households can afford to purchase up to €108,101, and a further 148 up to €146,991. Assuming a linear distribution, 584 households ($592/146,991 \times 145,000$) can afford houses up to €145,000. As only 4 houses are available at this price, there is a shortfall of 580 (584-4) houses that are affordable.

A further 156 (148+8) households can afford up to €189,134. A further 148 more can afford up to €234,657. The number who can afford a house in the second price band of up to €219,000 is 829 ($888/234,657 \times 219,000$). Subtracting the earlier figure of 584, gives 245 households that can afford to purchase up to €219,000, the price at which 139 houses can be provided. Thus a further 106 (245-139) households do not meet the affordability definition.

In total therefore some **686** (580+106) households are unlikely to be able to purchase houses, equal to **46.3%** ($686/1480$) of the predicted household formations of this year.

6.2 Affordability Index 2011

1,515 new housing units are required to be provided in 2011. Assuming the house prices continue to fall in accordance with Scenario 2 set out in Section 5 above, these will be provided at the following price ranges:

Price band	69-136	136-206	206-274	274-342	342-411	411-479	479-548	548-617	617-723	723+
No. of units provided	5	142	500	464	170	106	38	15	24	53

Assuming that incomes recover along the lines of the 'Economic Recovery' scenario as set out in Section 3.2 above, affordability will be as follows:

Income decile	No. of houses required in each decile	Affordable house price
1st decile	151	50,249
2nd decile	151	77,328
3rd decile	151	113,506
4th decile	151	154,340
5th decile	151	198,590
6th decile	151	246,390
7th decile	151	300,530
8th decile	151	369,026
9th decile	151	449,065
10th decile	151	705,479

There are 5 houses in the house price distribution table above under €136,000. A total of 453 households can afford to purchase up to €113,506, and a further 151 up to €154,340. Assuming a linear distribution, 532 households ($604/154,340 \times 136,000$) can afford houses up to €136,000. As only 5 houses are available at this price, there is a shortfall of 527 (532-5) houses that are affordable.

A further 223 (151+72) households can afford up to €198,590. A further 151 more can afford up to €246,390. The number who can afford a house in the second price band of up to €206,000 is 757 ($906/246,390 \times 206,000$). Subtracting the earlier figure of 532, gives 225 households that can afford to purchase up to €206,000, the price at which 142 houses can be provided. Thus a further 83 (225-142) households do not meet the affordability definition.

In total therefore some 610 (527+ 83) households are unlikely to be able to purchase houses, equal to 40.4% (610/1510) of the predicted household formations of this year.

6.3 Affordability Index 2012

2,840 new housing units are required to be provided in 2012. Assuming the house prices continue to fall in accordance with Scenario 2 set out in Section 5 above, these will be provided at the following price ranges:

Price band	69-136	136-206	206-274	274-342	342-411	411-479	479-548	548-617	617-723	723+
No. of units provided	9	267	937	869	318	199	71	28	45	99

Assuming that incomes recover along the lines of the 'Economic Recovery' scenario as set out in Section 3.2 above, affordability will be as follows:

Income decile	No. of houses required in each decile	Affordable house price
1st decile	284	52,762
2nd decile	284	81,195
3rd decile	284	119,182
4th decile	284	162,057
5th decile	284	208,520
6th decile	284	258,710
7th decile	284	315,556
8th decile	284	387,478
9th decile	284	471,519
10th decile	284	740,753

There are 9 houses in the house price distribution table above under €136,000. A total of 852 households can afford to purchase up to €119,182, and a further 284 up to €162,057. Assuming a linear distribution, 953 households ($1,136/162,057 \times 136,000$) can afford houses up to €136,000. As only 9 houses are available at this price, there is a shortfall of 944 (953-9) houses that are affordable.

A further 467 (284+183) households can afford up to €208,520. The number who can afford a house in the second price band of up to €206,000 is 1,402 ($1,420/208,520 \times 206,000$). Subtracting the earlier figure of 953, gives 449 households that can afford to purchase up to €206,000, the price at which 267 houses can be provided. Thus a further 182 (449-267) households do not meet the affordability definition.

In total therefore some 1,126 (944+182) households are unlikely to be able to purchase houses, equal to 39.6% ($1,126/2,840$) of the predicted household formations of this year.

6.4 Affordability Index 2013

2,705 new housing units are required to be provided in 2013. Assuming the house prices continue to fall in accordance with Scenario 2 set out in Section 5 above, these will be provided at the following price ranges:

Price band	69-136	136-206	206-274	274-342	342-411	411-479	479-548	548-617	617-723	723+
No. of units provided	8	254	893	828	303	189	68	27	43	95

Assuming that incomes recover along the lines of the 'Economic Recovery' scenario as set out in Section 3.2 above, affordability will be as follows:

Income decile	No. of houses required in each decile	Affordable house price
1st decile	270	55,400
2nd decile	270	85,254
3rd decile	270	125,141
4th decile	270	170,160
5th decile	270	218,946
6th decile	270	271,645
7th decile	270	331,334
8th decile	270	406,851
9th decile	270	495,095
10th decile	270	777,790

There are 8 houses in the house price distribution table above under €136,000. A total of 810 households can afford to purchase up to €125,141, and a further 270 up to €170,160. Assuming a linear distribution, 863 households ($1,080/170,160 \times 136,000$) can afford houses up to €136,000. As only 8 houses are available at this price, there is a shortfall of **855** ($863-8$) houses that are affordable.

A further 487 ($270+217$) households can afford up to €218,946. The number who can afford a house in the second price band of up to €206,000 is 1,270 ($1,350/218,946 \times 206,000$). Subtracting the earlier figure of 863, gives 407 households that can afford to purchase up to €206,000, the price at which 254 houses can be provided. Thus a further **153** ($407-254$) households do not meet the affordability definition.

In total therefore some **1,008** ($855+153$) households are unlikely to be able to purchase houses, equal to **37.3%** ($1,008/2,700$) of the predicted household formations of this year.

6.5 Affordability Index 2014

2,767 new housing units are required to be provided in 2014. Assuming the house prices continue to fall in accordance with Scenario 2 set out in Section 5 above, these will be provided at the following price ranges:

Price band	70-137	137-208	208-277	277-345	345-415	415-484	484-553	553-623	623-730	730+
No. of units provided	8	260	913	847	310	194	69	28	44	97

Assuming that incomes recover along the lines of the 'Economic Recovery' scenario as set out in Section 3.2 above, affordability will be as follows:

Income decile	No. of houses required in each decile	Affordable house price
1st decile	277	58,170
2nd decile	277	89,517
3rd decile	277	131,398
4th decile	277	178,668
5th decile	277	229,893
6th decile	277	285,228
7th decile	277	347,901
8th decile	277	427,194
9th decile	277	519,849
10th decile	277	816,680

There are 8 houses in the house price distribution table above under €137,000. A total of 831 households can afford to purchase up to €131,398, and a further 277 up to €178,668. Assuming a linear distribution, 850 households ($1,108/178,668 \times 137,000$) can afford houses up to €137,000. As only 8 houses are available at this price, there is a shortfall of 842 (850-8) houses that are affordable.

A further 535 (277+258) households can afford up to €229,893. The number who can afford a house in the second price band of up to €208,000 is 1,253 ($1,385/229,893 \times 208,000$). Subtracting the earlier figure of 850, gives 403 households that can afford to purchase up to €208,000, the price at which 260 houses can be provided. Thus a further 143 (403-260) households do not meet the affordability definition.

In total therefore some 985 (842+143) households are unlikely to be able to purchase houses, equal to 35.6% ($985/2770$) of the predicted household formations of this year.

6.6 Affordability Index 2015

3,078 new housing units are required to be provided in 2015. Assuming the house prices continue to fall in accordance with Scenario 2 set out in Section 5 above, these will be provided at the following price ranges:

Price band	71-140	140-212	212-283	283-352	352-423	423-494	494-564	564-635	635-745	745+
No. of units provided	9	289	1016	942	345	215	77	31	49	108

Assuming that incomes recover along the lines of the 'Economic Recovery' scenario as set out in Section 3.2 above, affordability will be as follows:

Income decile	No. of houses required in each decile	Affordable house price
1st decile	308	61,078
2nd decile	308	93,993
3rd decile	308	137,968
4th decile	308	187,602
5th decile	308	241,388
6th decile	308	299,489
7th decile	308	365,296
8th decile	308	448,554
9th decile	308	545,842
10th decile	308	857,514

There are 9 houses in the house price distribution table above under €140,000. A total of 924 households can afford to purchase up to €137,968, and a further 308 up to €187,602. Assuming a linear distribution, 919 households ($1,232/187,602 \times 140,000$) can afford houses up to €140,000. As only 9 houses are available at this price, there is a shortfall of 910 (919-9) houses that are affordable.

A further 621 (308+313) households can afford up to €241,388. The number who can afford a house in the second price band of up to €212,000 is 1,353 ($1,540/241,388 \times 212,000$). Subtracting the earlier figure of 919, gives 434 households that can afford to purchase up to €212,000, the price at which 289 houses can be provided. Thus a further 145 (434-289) households do not meet the affordability definition.

In total therefore some 1,055 (910+145) households are unlikely to be able to purchase houses, equal to 34.3% ($1,055/3,080$) of the predicted household formations of this year

6.7 Affordability Index 2016

2,911 new housing units are required to be provided in 2016. Assuming the house prices continue to fall in accordance with Scenario 2 set out in Section 5 above, these will be provided at the following price ranges:

Price band	73-144	144-218	218-291	291-363	363-436	436-509	509-581	581-654	654-767	767+
No. of units provided	9	274	961	891	326	204	73	29	47	102

Assuming that incomes recover along the lines of the 'Economic Recovery' scenario as set out in Section 3.2 above, affordability will be as follows:

Income decile	No. of houses required in each decile	Affordable house price
1st decile	291	64,132
2nd decile	291	98,693
3rd decile	291	144,866
4th decile	291	196,982
5th decile	291	253,457
6th decile	291	314,463
7th decile	291	383,561
8th decile	291	470,981
9th decile	291	573,134
10th decile	291	900,390

There are 9 houses in the house price distribution table above under €144,000. A total of 582 households can afford to purchase up to €98,693, and a further 291 up to €144,866. Assuming a linear distribution, 868 households ($873/144,866 \times 144,000$) can afford houses up to €144,000. As only 9 houses are available at this price, there is a shortfall of 859 (868-9) houses that are affordable.

A further 296 (291+ 5) households can afford up to €196,982. A further 291 more can afford up to €253,457. The number who can afford a house in the second price band of up to €218,000 is 1251 ($1,455/253,457 \times 218,000$). Subtracting the earlier figure of 868, gives 384 households that can afford to purchase up to €218,000, the price at which 274 houses can be provided. Thus a further 110 (384-274) households do not meet the affordability definition.

In total therefore some 968 (859+110) households are unlikely to be able to purchase houses, equal to 33.3% ($968/2,910$) of the predicted household formations of this year.

6.8 Summary of Anticipated Social and Affordable Housing need

Year	2010	2011	2012	2013	2014	2015	2016
(1) Household formations	1,480	1,510	2,840	2,700	2,770	3,080	2,910
(2) No. not meeting affordability criteria per S93(1)	686	610	1,126	1,008	985	1,055	968
(2) as % of (1)	46.3	40.4	39.6	37.3	35.6	34.3	33.3

The policy conclusions drawn from the summary analysis above are that the Planning Authority will aim to reserve 20% of zoned land (as defined under Section 94(4)(c)) for the purposes of meeting the social and affordable housing need.

7. Housing supply

Section 2.2 of this Strategy has already set out the number of additional housing units required during the currency of this Housing Strategy and the County Development Plan 2010-2016 (17,298 units). It has also been shown that there will be significant affordability issues and that the Local Authority will be required to intervene in new developments to the maximum permitted extent of 20%. Intervention at this level is expected to yield 3,460 units.

The Housing Strategy and the County Development Plan 2010-2016, as well as the Local Authority Housing Programme must ensure that there is sufficient land zoned and serviced to deliver these houses and policies in place to ensure the delivery and social and affordable units.

7.1 Development capacity

Table 7.1A details the town development plans in effect in County Wicklow and sets out the amount of existing zoned land available in each. Furthermore, an estimate of development capacity and number of residential units in construction or granted but awaiting construction is provided. This information is sourced from the 2008 Housing Land Availability Study, which the Local Authorities prepare annually for submission to the DoEHLG. However, it has been updated to take into account the adoption of new plans for Carnew, Kilcoole, Newtownmountkennedy, Tinahely, Wicklow Environs and Rathnew, Enniskerry and Bray Environs.

Table 7.1A Zoned land in County Wicklow and development capacity

Settlement	Period of plan	Amount of undeveloped zoned land	Amount of Local Authority undeveloped zoned land	Development capacity (units)	No. of units in construction or awaiting commencement
Bray Town Plan	2005-2011	23	0	1,094	227
Bray Environs	2009-2015	58	0	2,680	0
Wicklow Town Plan	2007-2013	28	8.5	679	262
Wicklow Environs (incl Marilton LAP)	2008-2014	280	0	7,700	1,400
Arklow Town Plan	2005-2011	79	15	2,300	180
Arklow Environs	2006-2012	65	0	1304	69
Greystones/Delgany	2006-2012	120	12.35	1333	242
Newtownmountkennedy	2008-2014	36	0	739	980
Ashford	2008-2014	50	0.4	1,010	183
Aughrim	2004-2010	24	0	459	36
Baltinglass	2008-2016	28	0.93	477	5
Carnew	2009-2016	16	2.4	313	261
Enniskerry	2009-2015	19	0	325	18
Kilcoole	2008-2014	25	4.5	532	251
Rathdrum	2006-2012	23	1.2	463	290
Dunlavin	2008-2016	34	1.95	687	3
Newcastle	2007-2016	28	0	340	50
Roundwood	2007-2016	13	0	250	36
Tinahely	2009-2016	20	1.35	404	64
Shillelagh	2004-2010	17	2.5	359	53
Total		986	51	23,488	4,610

This table shows that there is currently sufficient land zoned to meet Wicklow's housing needs up to 2016. Although there is clearly significant 'headroom' in that there is approximately 50% more land zoned than is required to meet the housing growth needs, some settlements will not have the necessary infrastructure to allow all zoned lands to be developed within the lifetime of the Housing Strategy and County Development Plan 2010-2016. It should also be noted that this

table does not provide an estimate of the number of units that may be developed in smaller towns, villages and rural areas. The 2006 census revealed that only 67% of the County's population resided in the 17 settlements included in Table 7.1A.

7.2 Infrastructure

While there are restrictions in the County with regard to transport infrastructure (roads, rail, public transport etc), these do not in the main present a bottleneck to the release or development of zoned land. Similarly, deficiencies in social and economic infrastructure persist, but the County Development Plan, Town Development Plans and Local Area Plans control the role out of new residential development such that it is commensurate with development of this necessary social infrastructure. However, restrictions in sanitary services have and continue to present serious blockages to development. Table 7.2A below shows that amount of land in the principal County settlements up to 2014 that is serviceable by water supply and wastewater collection / treated systems, on the basis of investment planned over the period⁶.

Table 7.2A Amount of undeveloped zoned land serviceable pre-2014

Settlement	Amount of undeveloped zoned land	Amount of undeveloped zoned land serviceable pre-2010	Development capacity 2008-2010 (units)	Amount of undeveloped zoned land serviceable pre-2014	Development capacity 2008-2014 (units)
Bray Town Plan	23	20	1,100	23	1,094
Bray Environs	58	0	0	58	2,680
Wicklow Town Plan	28	28	679	28	679
Wicklow Environs (incl Marlton LAP)	280	0	0	267	5,340
Arklow Town Plan	79	0	0	0	0
Arklow Environs	65	0	0	0	0
Greystones/Delgany	120	0	0	120	1,333
Newtownmountkennedy	36	0	0	36	739
Ashford	50	0	0	50	1,010
Aughrim	24	1	20	1	20
Baltinglass	28	4	80	4	80
Carnew	16	16	313	16	313
Enniskerry	19	19	325	19	325
Kilcoole	25	0	0	25	532
Rathdrum	23	0	0	23	463
Dunlavin	34	0	0	34	687
Newcastle	28	0	0	28	340
Roundwood	13	0	0	0	0
Tinahely	20	0	0	0	0
Shillelagh	17	0	0	0	0
Total	986	88	2,517	743	16,901

Between 2006 and 2010, the projected growth of the County will give rise to the formation of 5,820 households (see Table 2.2B above). There have been approximately 4,900 new homes completed between 2006-2008⁷. There is permission outstanding for 4,610 units and development capacity for 2,517 additional units (as per Table 7.2A above). Therefore while there are significant capacity constraints in sanitary infrastructure up to 2010, it is apparent that there is and will be no shortfall in potential development to meet the growing population.

⁶ Note that Blessington is not included in this table as there is no town plan in place for the settlement and therefore no zoned land.

⁷ See Section on house completions to follow

In the medium term (up to 2014), there will be capacity for 21,511 new residential units (16,901 units on currently undeveloped zoned land plus the 4,610 units already permitted). However, only approximately 72% (15,644) of the 21,633 new households formed up to 2016 will be formed before 2014 and therefore it is clear that sanitary infrastructure will not impede the delivery of sufficient residential units to meet the projected growth in population.

It is however important to note the infrastructural difficulties being experienced in Arklow, which is designated a Large Growth Town II in the County Settlement hierarchy and the Regional Planning Guidelines for the Greater Dublin Area 2004-2016. It is considered unlikely that wastewater collection and disposal infrastructural deficits will be resolved before 2014.

Furthermore, both of the major settlements in the west of the County (Baltinglass and Blessington) are experiencing short to medium term restrictions on development, while only the settlement in Carnew in the south of the County has development capacity. There are clear implications therefore for the spatial distribution of new residential units in the County, with the housing needs of those desiring or willing to live in the north and east of the County being met, but significant restrictions elsewhere in the County. This however generally correlates to the growth strategy for the County as set out in the Regional Planning Guidelines for the Greater Dublin Area 2004-2016.

7.3 Housing Output

House completion data from the Department of the Environment, Heritage and Local Government (which is based on the number of new dwellings connected by ESB networks) shows that completions in Wicklow have been steadily falling since 2006 with the most extreme contraction occurring in 2008 where the number of completions fell by 28.5% compared to the previous year (Table 7.3A).

National house completions in 2008 had fallen to 51,724 from 78,027 in 2007 and 93,419 in 2006. House completions are expected to continue to fall through 2009 and 2010. Some analysts are predicting a further fall of c. 25-30,000 for 2009 (fall of up to 60% on 2008 figure) and further falls in 2010, resulting in output of only 15,000 units nationally in 2010 (this equates to about 29% of the 2008 figure). Assuming that this pattern is replicated in Wicklow, house completions may be expected to fall to 550 in 2009 and 370 in 2010. The degree to which completions may recover in 2011 is unclear, but an optimistic prediction may be a gradual return to 2008 levels by 2012 and increases thereafter of 10% per annum to 2016 as pent up demand is fulfilled.

Table 7.3A: House Completions County Wicklow 1994- 2008

Year	Completions
1994	781
1995	1,030
1996	1,168
1997	1,147
1998	1,335
1999	1,294
2000	1,484
2001	1,914
2002	2,002
2003	1,800
2004	2,076
2005	2,341
2006	1,967
2007	1,704
2008	1,219

Source: Department of the Environment, Heritage and Local Government Bulletin of Housing Statistics

Table 7.3B: Projected House Completions County Wicklow 2009 – 2016

Year	Completions
2009	550
2010	370
2011	600
2012	1,200
2013	1,320
2014	1,450
2015	1,600
2016	1,760

Source: Forward Planning Dept, Wicklow County Council

7.4 Conclusions

This analysis of housing supply draws out the following issues that require to be addressed through the objectives or actions of the Local Authority:-

1. The County Development Plan requires to set out targets with regard to population growth in the County, to allocate this growth to various settlements and to ensure that local area plans are crafted that ensure sufficient zoned land to meet the anticipated growth in the County.
2. The County Development Plan should set out long term targets for population and housing growth in order to provide a longer term timeframe for the planning and delivery of services, in particular water infrastructure.
3. A Settlement Strategy requires to be implemented in the County that will aim to achieve more balanced growth in the County. As set out in the NSS, a settlement hierarchy will incorporate a range of settlements from small to large and concerns service and economic function as well as population.

The current settlement strategy for Wicklow is under review as part of the review of the County Development Plan 2004-2010. This hierarchy is drawn chiefly from the strategy set out in the Regional Planning Guidelines for the Greater Dublin Area 2004-2016. However, having regard to the infrastructural deficiencies in some of the identified growth towns and the poor spatial distribution of growth centres, two additional growth centres are proposed, namely Baltinglass and Rathdrum, which are elevated to moderate growth towns, in the same category as Blessington and Newtownmountkennedy.

4. While the Settlement Strategy may aim to direct new housing growth into the designated growths settlement in the County, rural housing will continue to be developed. This will include any small housing developments in the smaller towns and villages in the County. There will also be a demand for social and affordable housing in such locations. The County Development Plan should therefore set out policies in relation to the delivery of social and / or affordable units as part of such developments.
5. While there is currently sufficient zoned land in the County to meet the housing needs that will arise over the lifetime of the Strategy, this land must be developed in a manner that is matched with the housing needs arising. A range of house types and sizes will need to be developed to meet the demands of the market, including first time buyers.
6. The Water Services Investment programme should mirror the County Settlement Strategy, thereby ensuring that there are a range of serviced settlement sizes and types in all regions of the County

7. The current slowdown in housing output is likely to leave a longer term deficit in housing supply, beyond the lifetime of this strategy. Between 2006 and 2016, in order to meet projected County population target of 165,299 persons, a total of 21,633 new housing units will be required. However, it is estimated that only 13,740 units will be constructed over the same period.

8. Social and Affordable Housing

8.1 Introduction

The analysis of housing affordability anticipates that between 33%-46% of new households formed in the period of the strategy (on an annual basis) will continue to experience difficulties in respect of affordability. It has also been noted in Section 7 of the report that there is adequate zoned residential land within the County to meet anticipated demand for housing.

The requirement for social and affordable housing stems from two main sources: existing households who cannot afford to meet their housing needs (*accumulated* need) and new households, formed over the lifetime of the Strategy, who will be unable to afford either owner occupied or market rented accommodation (*prospective* need). Accumulated need is made up from the Local Authority social and affordable housing register and those with special needs. The prospective need is a percentage of households from the total number of new households requiring affordable or social housing based on projected income profiles.

The supply to meet the demand is met by the Local Authority multi annual programme over the plan period, voluntary housing organisations projected completions, the Local Authority's affordable housing scheme and Part V and supply from the private sector to meet open market demand.

This section of the report examines the trends in terms of the existing demand for Social and Affordable Housing (as evidenced by the Local Authorities' waiting lists) and demand as projected over the period of the Strategy.

8.2 Social and Affordable Housing Demand

At the end of 2008, there were 3,569 live applications for housing on the Local Authorities' Housing Lists (*accumulated* need)⁸. This figure however overestimates the number of households in need of housing assistance as:

- this may include households that have addressed their housing needs themselves but have not informed that housing authority of this;
- this may include households that have applied for housing in both the County and Town Council areas, or other Local Authorities;
- this may include households for which a number of separate applications have been received.

It is considered that when these factors are taken on board, the demand reduces by c. 30% to approximately 2,500 households.

⁸ County Area = 1,736
Bray Town Council = 966
Wicklow Town Council = 259
Arklow Town Council = 608

With regard to *prospective* need, it is difficult to make predictions about how the demand for social and affordable housing will change over the plan period, as this will be dependent on numerous factors including income growth / decline, house prices and housing supply.

The number of new applications for social housing has been steadily increasing, from 489 in 2005, 616 in 2006, 731 in 2007 and 1,049 in 2008. There have been 597 new applications in the first 5 months of 2009. This rapid rate of increase clearly reflects the gap in affordability experienced during the boom years, when house prices increased out of the reach of many in society.

It has to be assumed that this exceptional rate of increase will not continue indefinitely into the future and as stability returns to the housing market, applications will moderate. As set out above, given the estimate that 33%-46% of households will experience affordability difficulties, it is estimated that 6,438 households over the lifetime of this strategy (end 2010 to end 2016) or 1,075 per annum will experience affordability difficulties.

It is unlikely that all of those experiencing affordability difficulty will place themselves on the Council's housing list, but even assuming a modest rate of 50%, this will require the delivery of c. 500 social and/or affordable units per annum. The current local authority land bank is not sufficient to meet this demand (capacity of c. 1,500 units). This will require to be addressed through active land acquisition and housing construction by the local authority / voluntary sectors and delivery by private developers through Part V.

8.3 Social and Affordable Housing Supply

This section sets out the record of delivery of social and affordable housing since 2004 and the plans for the delivery of further social and affordable housing during the lifetime of this Housing Strategy and County Development Plan 2010-2016.

Table 8.3A: Social and affordable housing delivery In County Wicklow 2004-2008

Housing Type	2004	2005	2006	2007	2008
Social rented, voluntary and cooperative housing					
Completion and acquisitions (Part V acquisitions shown in brackets)	93 (2)	171 (13)	141 (5)	166 (35)	240 (18)
Voluntary and cooperative housing (Part V delivery shown in brackets)	0 (0)	30 (0)	15 (0)	11 (0)	17 (7)
RAS; extension / improvement works in lieu of re-housing; traveller new and refurbished units	9	8	29	46	*
Houses available to rent from existing stock	69	81	84	97	*
Total social rented accommodation provision	171	290	269	320	257
Affordable Housing					
1999 Construction Programme, AHI, AHP, shared ownership, mortgage allowance	56	24	36	45	60
Part V (only includes units acquired)	13	1	18	22	
Other affordable (excluding Part V)	*	*	0	24	35
Total affordable housing provision	69	25	54	91	95

Source: DoEHLG, Wicklow County Council Housing Dept

Up to June 2009, the following local authority schemes were completed or under construction:

Location	Social	Affordable
Avoca	8	
Carnew	25	
Roundwood	30	11
Ashford	16	
Farrankelly	54	
Sutton Villas, Bray Town	4	
Hillview, Wicklow Town	4	

Following completion of the schemes currently under construction, there are no other significant schemes due to commence, due to lack of sufficient funding. However, the Local Authorities still have significant land banks available for development and will continue to prepare projects and site briefs (as funding allows) so that development can commence swiftly when funding becomes available.

Furthermore, smaller schemes, principally involving the redevelopment of under utilised sites or derelict land / properties will continue.

The Housing Authority will also continue to:

- pursue additional funding;
- cooperate with other housing bodies;
- investigate other options for the delivery of housing, including the long term leasing of unsold new properties⁹.

8.4 Housing needs of the elderly and people with a disability

Wicklow Local Authorities will continue to meet the needs of the elderly, and persons with a disability, within their respective Housing Construction Programmes. Where possible standard housing will be constructed as *Life Time Housing*. In addition to this it is envisaged that 5% of the housing programme will be dedicated to the elderly and disabled persons.

Wicklow Local Authorities will continue to promote and encourage the provision of special type units via Part V and the capital assistance programme. All dwellings comply with Part M of the Building Regulations and the Council includes where possible and in accordance with demand/need and where the site allows, the inclusion of bungalows specifically designed for the elderly and disabled. It is envisaged that much of the elderly housing provision will come via Part V developments.

Wicklow County Council operates the Disabled Persons Grants Scheme on behalf of the four local authorities in County Wicklow. Applications show no sign of abating. If the demand for the grant exceeds the availability of financing from the Department of the Environment, Heritage and Local Government and the Councils own available finances the Council will have to consider putting place a scheme to prioritise the allocation of grants and the dedication of such scarce resources. The allocation of resources will be examined when preparing the annual budgets.

⁹ The statutory basis for the provision of social housing through leasing is provided in the Housing Act 1966 and is being updated in the Housing (Miscellaneous Provisions) Bill 2008.

8.5 Homelessness

Wicklow Local Authorities recognises that homelessness is a serious issue which needs to be tackled in an urgent but proactive way. The Government's policy document 'Homelessness – An Integrated Strategy' sets out an inter-agency approach to tackling the problems of homelessness in a co-ordinated manner. The strategy recognises that a solution to homelessness is not just about the provision of housing or shelter but that there is a need for a comprehensive approach to enable homeless persons to re-integrate into society and to prevent others from becoming homeless.

The role and involvement of a wide range of agencies is therefore crucial to ensure that the full range of housing options and support services are available to homeless persons and that their route into homelessness is effectively cut off. Both the local authorities and the health board have a key central role in meeting the needs of the homeless and their involvement in this area should be on a joint basis and in partnership with the voluntary bodies. Wicklow Local Authorities are responsible for the provision accommodation for homeless persons as part of their overall housing responsibility while the Health Board is responsible for the health and welfare of the homeless person.

8.6 Traveller accommodation

The Housing (Traveller Accommodation) Act (1998) imposed an obligation on relevant housing authorities in consultation with Travellers and the general public to prepare, adopt and implement a Traveller Accommodation Programme for the period 2000 - 2004. Wicklow County Council and Bray Town Council, being the relevant housing authorities, have now adopted their 3rd 4-year Traveller Accommodation Programme, with effect 2009 – 2013.

The purpose of the 1998 Act and this Programme is to put in place the necessary procedures, measures, resources and facilities that are required to accommodate Travellers. While the primary objective of this programme is to provide the necessary accommodation there are many issues such as education, training, equality etc that must be addressed in conjunction with the provision of accommodation. It will require changes in attitudes and acceptance of different lifestyles from all parties involved.

The provision of accommodation is ongoing and targets will not be achieved quickly or easily, however, it is essential that the process continue. In accordance with Section 6(1) of the Housing (Traveller Accommodation) Act, an assessment of need was carried out by the Council in September 2008. While it is noted that Traveller families may move from their location and further changes will take place during the lifetime of the programme, it has been determined that current need is in the order of 62 units (made up of group housing schemes, rural houses, halting sites and standard houses as may be deemed appropriate), with another 30 units being required during the lifetime of the programme (up to 2013).

9. Housing Strategy Objectives

9.1 Introduction

Despite increases in the delivery of social and affordable housing over recent years, the demand for such housing continues to grow. The analysis in the Strategy has demonstrated that a significant affordability problem exists in the County and that there is a strong rationale for the policy of reserving 20% of eligible residential developments for social and affordable housing. It is also clear, however, that the combination of the Councils' own construction programme (and other forms of provision) and Part V will only cater for a proportion of the population experiencing affordability problems in the County. The situation may be exacerbated by the recent national economic downturn and consequent pressures on Council finances in relation to direct provision of social and affordable housing.

The analysis also shows the regional disparity in housing supply and the bottlenecks that will be faced in delivering the required housing to meet the target County population.

The Council must continue to utilise all policy avenues open to it and any new schemes that become available to ensure the greatest delivery of social and affordable housing possible and to ensure a regionally equitable balance of housing delivery.

9.2 Objectives

- H1** To ensure the delivery of sufficient new homes to accommodate the growth of the County to 165,299 persons in 2016.
- H2** To ensure that houses are delivered in the locations required, to implement a balanced settlement strategy that provides for growth towns of varying sizes throughout the County.
- H3** To ensure sufficient zoned land is available in all growth settlements to meet projected housing demand.
- H4** To ensure that water services are or will be available during the currency of the plan, sufficient to meet the housing demand.
- H5** To ensure that investment in infrastructure is distributed in a balanced manner around the County, with priority given to designated growth towns.
- H6** To require that 20% of any unzoned land developed for residential use, or for a mixture of residential and other uses, shall be devoted to affordable housing.
- H7** To require that 20% of all zoned land developed for residential use, or for a mixture of residential and other uses, shall be devoted to social and affordable housing, in the following manner:
 - 1/3 social housing;
 - 1/3 affordable;
 - 1/3 discretionary, to be advised by the Local Authority, having regard to the housing needs in that area.
- H8** To require all new social and / or affordable housing development (whether Local Authority / Voluntary or Part V schemes) to provide a minimum of 50% of the units at a size of 3 bedrooms or greater.

- H9** To require all applicants for permission that will include social and / or affordable housing to engage in meaningful pre-planning discussions with both the Housing and Planning Authorities, in order to establish at the outset the location, house size and house design requirements of both Authorities.
- H10** To require the highest standard of design in all new social / affordable development or development containing an element of social / affordable housing, in accordance with the development standards set out in the County Development Plan and the DoEHLG social housing guidelines.
- H11** To encourage proposals from developers to satisfy Part V obligations which are directed toward special need categories – namely, elderly accommodation, traveller accommodation, specialised accommodation for the homeless and specially adapted accommodation for persons with disabilities – where the proposal is related to an identified local need and is consistent with other policies of the Development Plan.

10. Implementation

Section 96 of the Planning Act sets out the manner in which this percentage (not greater than 20%) can be met. This includes for:

- The transfer of land
- Build and transfer of houses
- Transfer fully or partially serviced sites
- Transfer of other land in the functional area
- Build and transfer of houses in the functional area
- Transfer of fully or partially serviced sites in the functional area
- Payment of cash
- Transfer of land and/or a combination of the others
- Combination of two or more of the others.

When considering any of the above (except the transfer of land) the Planning Authority must consider:

- If the agreement will achieve the objectives of the Strategy
- If it is the best use of resources
- The need to counteract undue segregation
- If it is in accordance with the Development Plan
- The timeframe for providing the housing

In any of the above, the Planning Authority must consider the proper planning and sustainable development of the area, the Housing Strategy, the coherence of the development and the views of the applicant on the impact of the agreement. Part V applies to all applications for residential development on sites in excess of 0.1ha or 4 units on residential/mixed use (where residential is part) zoned land.

The Planning Authority will include conditions on the permission requiring that the developer enter into an agreement with the Planning Authority regarding their obligations under Part V, prior to commencement of development. The agreement must identify the land, sites or houses to be transferred on foot of this agreement (either on or off the site but within the functional area of the Authority). The transfer of land is the default requirement set out in the Act. The decision on the transfer of sites or houses in lieu of land or such other compliance as specified in the Planning and Development Acts is a matter for negotiation between the developer and the planning authority and is subject to agreement between the two parties.

The Planning Authority will operate Part V of the Act in a way that encourages and facilitates a level of supply, which will meet the demands of all sectors of the market. It would frustrate the

objectives of the Housing Strategy if its implementation were to result in any undue slow down, interruption of housing supply, or disruption of the housing market.

Conditions attached to planning permissions for development to which the 20% social/affordable requirement applies will require developers to enter into an agreement with the Local Authority to the Local Authority transfer either:

- (a) Twenty per cent of the land of the site, or
- (b) Housing units where the total value of the planning gain of the unserviced site(s) of such units is equivalent in monetary value to the planning gain to the Council on the transfer of 20 per cent of the land of the site, or
- (c) Fully or partially serviced housing sites where the total planning gain for the unserviced element of such sites are equivalent in monetary value to the planning gain on 20% of the land of the site, or
- (d) A payment of such an amount, which is equivalent to the monetary value of the amount accruing to the Planning Authority, under the provisions of a, b or c above, (ie equal in monetary value to the planning gain to the Council on the transfer of 20% of the land of the site) or.
- (e) The provision of (a), (b), (c) or (d) above at another area within Wicklow.

Planning gain means the difference between the open market value and the existing use value.

The ratio of social to affordable houses to be provided shall comply with the following objectives:

- 1/3 social rented;
- 1/3 affordable;
- 1/3 discretionary, assessed on a case-by-case basis, having regard to local housing needs.

This ratio may be changed in exceptional circumstances provided the local area Councillors are consulted at least 7 days in advance of the next Council meeting.

This Appendix sets out the County Retail Strategy, which forms part of the Wicklow County Development Plan and is applicable in both the County area and the Town Councils of Bray, Wicklow and Arklow.

As this Strategy is currently (June 2010) in the adoption process, it is still undergoing revisions and potential amendments. These amendments are shown in this document and when the strategy is adopted in September 2010, the final adopted version will form part of the Arklow Town and Environs Development Plan 2011-2017

The potential amendments of this strategy are shown in ~~blue-strikethrough~~ to indicate proposed deletions and **red text to indicate proposed additions**.

1.0 Introduction

This document sets out the Retail Strategy for County Wicklow (including the towns of Bray, Wicklow and Arklow) for the period 2010-2016 and replaces the existing (draft) retail strategy drawn up in 2002. The purpose of a retail strategy is to

- establish the optimum location for new retail development which is accessible to all sections of society and is of a scale which allows the continued prosperity of traditional town centres and existing retail centres, without inhibiting competition, preserving existing commercial interests or preventing innovation;
- Set out the criteria for the assessment of new retail developments

Section A of the County Development Plan 2010-2016 has set out a number of 'Strategic Goals' for the County during the plan period. The crafting and implementation of a robust Retail Strategy has the potential to positively contribute to the attainment of these goals, in particular:

- enhancement of the range of services available in the designated growth towns in the County;
- reduction in demand for travel, by providing retail at suitable locations where it is accessible by all in society and in particular, integrated with growth areas and public transport investment;
- protection of the County's infrastructure, in particular, the carrying capacity of regional and major roads and interchanges, by locating retail in existing town and district centres, served and accessed by the local road network;
- enhancement of employment and enterprise opportunities.

Strategy *To promote the development of an exciting and competitive retail sector, whilst protecting and integrity, vibrancy and vitality of existing centres.*

2.0 Context - policy influences on the County Retail Strategy

2.1 Retail Planning Guidelines for Local Authorities 2005

These guidelines provide a framework to assist local authorities in preparing Development Plans and assessing applications for planning permission and to guide retailers and developers in formulating development proposals.

The Guidelines confirm that the key challenge to be faced is how to accommodate the additional development that is projected to be required, in a way which is efficient, equitable and sustainable. It is vital to establish the optimum location for new retail development which is accessible to all sections of society and is of a scale which allows the continued prosperity of traditional town centres and existing retail centres. This can only be achieved if strategic retail policies and proposals are incorporated into the development system.

The guidelines identify a number of key objectives:-

- to ensure that in future all Development Plans incorporate clear policies and proposals for retail development;
- to facilitate a competitive and healthy environment for the retail industry of the future;
- to promote forms of development which are easily accessible, particularly by public transport and in a location which encourages multi-purpose shopping, business and leisure trips on the same journey;
- to support the continuing role of town and district centres, with a presumption against large retail centres located adjacent, close to, or in any area primarily exploiting high speed direct links to existing, new or planned national roads/motorways.

Shopping provision is recognised as a key component of town centres. Retailing makes a major contribution to their vitality and viability and the Guidelines therefore recommend that they retain retailing as a core function.

The Guidelines confirm that the preferred location for new retail development, where practicable and viable, is within town centres (or district or major village centres). However, where it is not possible to provide the form and scale of development that is required on a town centre site, consideration can be given to a site on the edge of a town centre, providing it is within an easy and convenient walking distance from the primary shopping core of a town centre.

A sequential approach should be applied to selecting sites for new retail development. Only where it has been determined that there are no sites within a town centre or an edge-of-centre location by virtue of size, availability, accessibility and feasibility, should an alternative out of centre site be considered.

The Guidelines set out the matters which are to be included in all future development plans:-

- 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 shopping area of town centres;
- A broad assessment of the requirement for additional retail floorspace;
- Strategic guidance on the location and scale of retail development;
- Preparation of policies and action initiatives to encourage the improvement of town centres;
- Identification of criteria for the assessment of retail developments.

In addition to the general policies and objectives, the Guidelines provide provisions for specific types of development including regional and district shopping centres, large foodstores and discount stores, retail parks and retail warehouses and local shops in towns, villages and rural areas.

2.2 Retail Strategy for the Greater Dublin Area (GDA) 2008-2016

The purpose of the Retail Strategy for the GDA is to guide the activities and policies for retail planning across the seven local authorities in the GDA, including Wicklow. The 2008 strategy replaces the previous 2001 strategy, which was considered necessary to review because of the many policy, economic and population changes that have occurred in the GDA since 2001.

The strategy aims to set out a co-ordinated, sustainable approach to the assessment and provision of retail within the GDA so that:-

- Adequate and suitable provision is made to meet the needs of the growing and changing population, both overall and locally, and provide for healthy competition and consumer choice;
- Retail developments are provided in suitable locations, integrated within existing growth areas and public transport investment;
- Significant overprovision, which would place more marginal locations under severe pressure and undermine sustainability driven policies aimed at revitalising town centres is avoided.

The Strategy sets out a strategic vision and guidance for retail planning in the GDA, which draws on quantitative analysis undertaken as part of the review, examining existing market pattern expenditure and future growth projections. By setting out a strategic framework for retail, the Strategy gives guidance on where future retail should be provided and what issues need to be addressed.

At the core of the Strategy is the revised retail hierarchy for the GDA, which is set in Table 1 to follow. The Strategy also sets out a series of principles and recommendations for each Council to consider as part of preparing their individual retail strategies. These include:-

- Advice regarding function and scale of centres in the hierarchy;
- Suggested thresholds for the preparation of retail impact assessments for retail applications;
- Thresholds for sequential test in assessing the appropriateness of the location of a retail development are proposed;
- Individual recommendations for each Council on issues regarding the main towns/centres – particularly the importance of supporting high quality appropriately sized new retail to support competitiveness;
- The importance of qualitative assessment for retail schemes and the use of planning conditions to ensure a coordinated and suitable delivery of retail schemes.
- The conclusions reached with regard to retailing in Wicklow and the specific recommendations for policies in Wicklow are set out in Section 3 to follow.

Table 1 Retail hierarchy for the Greater Dublin Area

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
	Dublin City: Finglas, Northside Shopping Centre, Ballyfermot, Rathmines, Crumlin Shopping Centre, Donaghmede Shopping Centre, Omni, Ballymun, Point Village and 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, and Maynooth, Kilcullen, Athy, Kildare, Monasterevin, Clane.
Level 4	NEIGHBOURHOOD CENTRES, LOCAL CENTRES – SMALL TOWNS & VILLAGES
Level 5	CORNER SHOPS / SMALL VILLAGES

The principle departure from the 2001 GDA Retail Strategy for Wicklow is upwards move of Blessington and Baltinglass from Level 4 to Level 3.

3.0 Retail Strategy for County Wicklow

In accordance with the Retail Planning Guidelines, the retail strategy for Wicklow will include the following:-

- 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 shopping area of town centres **in Levels 1-3 of the hierarchy**;
- 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.

Given the considerable research and analysis carried out for the GDA Regional Retail Strategy and the intention that the retail strategy for County Wicklow will be consistent with the Regional Retail Strategy, new local research has not been undertaken into existing retail floorspace, shopping patterns, expenditure estimates, turnover ratios etc. Instead quantitative analysis will generally be based on the findings of the research carried out for the Regional Retail Strategy. **The County Strategy is also generally consistent with the hierarchy adopted in the Regional Strategy. However, as that hierarchy was selected to be generally applicable across the entire Greater Dublin Area, it does not precisely cover all circumstances that arise in County Wicklow. This is**

particularly so in the sub core centres within Bray, Greystones, and Wicklow, and the County Strategy will include adjustments and flexibility to cater for these characteristics.

3.1 Retail hierarchy & the role of centres

Retail hierarchy

The retail hierarchy for County Wicklow is set out in Table 2. This hierarchy is drawn from both the GDA Retail Strategy and the County settlement strategy.

Table 2 Retail hierarchy for County Wicklow

LEVEL 1	METROPOLITAN AREA	HINTERLAND AREA
LEVEL 2	MAJOR TOWN CENTRES	COUNTY TOWN CENTRES
	Bray	Wicklow
LEVEL 3	TOWN / DISTRICT CENTRES	SUB COUNTY TOWN CENTRES
	Greystones	Tier 1 Towns serving a wide district Arklow, Blessington, Baltinglass Tier 2 Towns serving the immediate district Newtownmountkennedy, Rathdrum
LEVEL 4	NEIGHBOURHOOD CENTRES	LOCAL CENTRES – SMALL TOWNS
	Bray Area Boghall Road / Ballywaltrim, Vevay, Dargle Rd, Dublin Road / Little Bray, Albert Road & Walk, Fassaroe, Southern Cross Road Greystones Area Delgany, Blacklion, Charlesland, Killincarrig, Victoria Road	Ashford, Aghrim, Avoca, Carnew, Donard, Dunlavin, Enniskerry, Kilcoole, Kilmacanogue, Newcastle, Rathnew, Roundwood, Shillelagh, Tinahely
LEVEL 5	CORNER SHOPS	VILLAGES
		Bardarrig, Ballinacash, Coolboy, Glenealy, Hollywood, Johnstown / Thomastown, Kilpedder / Willowgrove, Kiltegan, Knockananna, Laragh – Glendalough, Manor Kilbride, Redcross, Stratford

The role of centres

Table 3 below outlines the retail formats expected in each level of the hierarchy, which gives guidance on the scale and levels of retail provision within each level.

Table 10.3 Retail formats in hierarchy levels

	HIGHER ORDER COMPARISON	MIDDLE ORDER COMPARISON	LOWER ORDER COMPARISON	SUPER- STORE	SUPER- MARKET
METROPOLITAN CENTRE	√	√	√	√	√
MAJOR TOWN CENTRES & COUNTY TOWN CENTRES	√	√	√	√	√
TOWN & SUB COUNTY TOWN CENTRES		√	√	√	√
LOCAL CENTRES – SMALL TOWNS & VILLAGES			√		√

Level 2 Major & County Town Centres

These centres will have a full range of all types of retail services from newsagents to specialist shops and boutiques, department stores, foodstores of all types, shopping centres and high level of mixed uses including the arts and culture to create a vibrant, living place. Such centres should be well connected and served by high quality public transport, particularly with the metropolitan area. For well-established centres with population catchments in excess of 60,000 people it would be expected that the volume of lettable retail floorspace would exceed 40,000sqm.

Level 3 Town / District and Sub County Town Centres

These centres will vary both in the scale of provision and the size of catchment, due to proximity to a Major Town / County Town centre. Generally where the centre has a large catchment (e.g. market town in a rural area) and is not close to a larger centre, there will be a good range of comparison shopping though no large department stores or centres, with a mix of retail types benefiting from lower rents away from larger urban sites, leisure & cultural facilities and a range of cafes and restaurants. At least one supermarket and smaller scale department store are required to meet local needs. It would be expected that financial and other services (banks and building societies) would be located alongside other retail services creating an active and busy centre. They should have high quality access from public transport where the centres are within the built up area; and also strong links to the built fabric so that walking and cycling to the centre from the immediate catchment is an attractive option. Where the centre is close to an existing major centre (as is the case with Greystones), the scale of retail and mixed provision is lower, with the town / centre range of shops meeting more basic day to day needs and only small scale range of comparison units trading. Such towns / centres would generally range in size from 10-25,000sqm of lettable retail space catering for a population of 10,000- 40,000.

This level is broken into two tiers for the purpose of this strategy, as the five towns in this level are not uniform in their size or function, but yet all are appropriately located in Level 3. Arklow, Blessington and Baltinglass, while being very different in size, are all similar in the sense that they serve a wide catchment and are sufficiently distant from major or county town so as to make them the principle shopping destination in their areas. **Arklow in particular has traditionally served as a market town for a wide area, and this traditional status has been reinforced by the development of the Bridgewater centre.** These towns are somewhat different from Rathdrum and Newtownmountkennedy, which are both within reasonable distance of the County town and which serve more localised catchments, but due to their planned growth, require a high level of retail provision.

Level 4 Neighbourhood Centres & Small Towns

While the GDA Retail Strategy generally considers that these centres will normally provide for one supermarket or discount foodstore ranging in size from 1,000-2,500 sqm with a limited range of supporting shops (one or two low range clothes shops with grocery, chemist etc.) and retail services (hairdressers, dry cleaners, DVD rental) cafes and possibly other services such as post offices or community facilities or health clinics, it is considered necessary to make a distinction in Wicklow between the type and quantum of retail envisaged in neighbourhood centres in the larger settlements and that envisaged for small towns.

Neighbourhood centres (i.e. locations providing retail and other community services outside of the core town centre area) generally only occur in the larger settlements of the County (Bray, Wicklow, Arklow and Greystones). Such centres would usually include a medium sized convenience shopping outlet (~~up to~~ **generally** 500sqm) and a number of smaller comparison and non-retail services premises. **However, a simple floor area rule cannot be simply applied. Firstly, what are designated as Neighbourhood Centres in Greystones and Bray include established full scale supermarkets at Bellevue Road and Vevay Road respectively. In addition there are smaller supermarkets at Blacklion and Charlesland in the 800m² to 1,200m² range. The Bray Town Development Plan has designated land for a 2,500m² supermarket at the Southern Cross Route in its last two plans, and planning permission has been granted for this as well as a discount store at this site. So while such sites seem larger than neighbourhood centres, they do not fit into the definition of District Centres (the next category in the hierarchy) which are defined in the Retail Planning Guidelines as 10,000m² or 20,000m² in the Dublin Metropolitan Area. So in a limited number of sub town core sites in Bray, Greystones, and Wicklow/Rathnew (particularly in Rathnew), larger foodstores will be permitted, based on there historic use, and the need to service considerable tranches of new housing ~~e.g. Vevay in Bray and Charlesland in Greystones~~. The scale of the convenience outlet will be dictated by the overall size of the town, the catchment of the neighbourhood centre and its distance to the town core.**

In contrast, the retail provision in small towns would be expected to be more extensive, including one supermarket / two medium sized convenience stores (up to 1,000sqm aggregate) and perhaps 10-20 smaller shops and would not **generally** be considered suitable for discount foodstores.

Level 5 Corner Shops/Small Villages

These shops meet the basic day to day needs of surrounding residents, whether as rural foci points close to other community facilities such as the local primary schools, post office and GAA club or as a terrace of shops within a suburb. Such centres will normally serve only an immediate catchment. Expected are one or two small convenience stores, newsagents, and potentially other tertiary services such as butcher/vegetable shops with a public house, hairdressers and other similar basic retail services; with the retail element in total ranging approximately from 500 - 1,500sqm of lettable space.

3.2 Boundaries of the core shopping area of town centres

The core areas for each of the main centres in the County are illustrated in Maps 01 and 02 at the end of this strategy.

3.3 Assessment of the requirement for additional retail floorspace

Given the considerable research and analysis carried out for the GDA Regional Retail Strategy, new local research has not been undertaken into existing retail floorspace, shopping patterns, expenditure estimates, turnover ratios etc. Instead quantitative analysis will generally be based on the findings of the research carried out for the Regional Retail Strategy.

The GDA Strategy carried out the following research in arriving at its conclusions:-

- Step 1** Population projections were made for each 'zone' in the GDA, which included three zones in Wicklow (north Wicklow, west Wicklow and south Wicklow);

- Step 2** Spending growth patterns were modelled to derive the spending power in each zone and to estimate future retail spend by zone (the current slowdown in economic activity is reflected in the forecasts of consumer spending);
- Step 3** These monetary figures were translated into floor space need and from this the future demand for retail floor space for both comparison and convenience shopping was calculated by deducting existing floorspace¹. To reflect the impact of retail services (non retail uses such as beauticians / banks / coffee shops etc occupying retail units), the figures are increased by 20%. These figures were then adjusted upwards by another 20% to allow for flexibility in meeting future demand by catering for permissions granted during the life of the strategy but where they will not be full trading until after 2016.

Main findings

The total retail turnover of the Dublin Region at the base year of 2007 is €8,947m, of which 64% is in comparison goods shopping. In-flow spend accounts for €2,186m (of which €1,131m is visitor/tourist expenditure) or almost 25% of turnover, and therefore is crucial in underpinning current retail trading performance. With regard to comparison goods, very little consumer retail expenditure leaks outside the region (just 3%) and accordingly there is little material scope for clawback of monies to support additional retail floorspace provision.

For the Mid East Region (i.e. the counties of Wicklow, Kildare and Meath), €1,350m of comparison goods expenditure is generated within the region at the base year of 2007. Of this total, an estimated €651m 'leaks' out to competitor centres (which includes the Dublin Area). This comprises of €491m of flows into the Dublin Region and €160m flowing to centres outside of the GDA. Thus, the Mid East currently retains just €699 million or 52% of the comparison goods expenditure generated by its residents. In-flow spend adds €160 million to the Mid East's comparison goods sales (with 88% in-flowing from outside the GDA), producing a turnover of €859 million. This total equates to just 15% of the comparison goods turnover for the Dublin Region.

The residents of the Mid East generate €1,168m of convenience goods expenditure of which €234m leaks out of the region. Some €121m flows into the Dublin Region, whilst the balance of €113m goes to centres outside the GDA. 80% of convenience goods spend is retained by the Mid East, a lower proportion than for the Dublin Region (96%). Adding in an in-flow spend of €64m, of which €48m is from the Dublin Region, gives an estimated aggregate convenience goods turnover for the Mid East of €998m, equivalent to 31% of that for the Dublin Region.

The combined retail turnover for the Mid East in 2007 is therefore €1,857m, of which 54% is accounted for by convenience goods shopping. Unlike the Dublin Region, which is a significant net importer of consumer retail expenditure, the Mid East attracts in only €224m of spend, but leaks €885m. It is therefore a net exporter of consumer retail expenditure. Thus, unlike for the Dublin Region, there is scope for clawing back retail expenditure, both in comparison and convenience goods shopping.

Comparison goods

All three counties within the Mid East Region are major net exporters of comparison goods expenditure, mainly because monies flow into the Dublin Region. North Wicklow has seen in the intervening years since 2001, substantial increases in the levels of outflow. This is due to the combination of little development of new comparison retail space in North Wicklow, and the substantial new space provided mainly in Dundrum, which has had the effect of accelerating what was already a steady existing exodus of retail expenditure from Wicklow, most likely aided by improvements to the N11. South Wicklow saw some improvement in retention levels. Wicklow is found in fact to be the worst performer in the region, retaining as little as 37% of available expenditure. Whilst retention of expenditure is a key parameter of sustainability, as it will assist in cutting down private car journeys, some expenditure outflows do make sense, such as to the city centre, or to major centres close to county boundaries where natural catchments cross boundary lines.

¹ In calculating the future need up to 2016, any inbuilt permissions were not included as floorspace provided due to the uncertainty whether or not all of the schemes will be built and the possibility that a number of the projects could be altered or replaced before works commenced.

Convenience

Unlike for comparison goods, most available convenience goods expenditure is spent locally, with all Counties achieving retention levels of 71% or more. County Wicklow is found to retain approximately 82% of convenience spend. This confirms that convenience goods shopping provision is much more evenly spread around the GDA relative to population and available expenditure. Balanced provision of convenience floorspace ensures that most trips for food shopping are relatively short compared to trips for comparison shopping - a pattern reflected in the survey findings. All three Counties in the Mid East Region leak more convenience goods spend than they attract highlighting an immediate need for increased convenience shopping in the Mid East counties, so that adequate convenience shopping is provided locally to the populations in each area - reducing the need to travel long distances by car for essential shopping.

County Wicklow

The GDA Regional Retail Strategy projects that County Wicklow requires an increase gross lettable convenience floorspace by 15,000sqm (or 18,000sqm if an additional 20% is allowed to facilitate possible future demand) and gross lettable comparison floorspace by 50,000-70,000sqm (or 61,000-83,000sqm) by 2016².

While GDA Strategy warns that some caution needs to be attached to the retail floorspace need estimates (due to the potential inaccuracies that come into play when preparing projections over long time periods), it is considered that the length of the forecast period (through to 2016) does mean that the cyclical impacts of changing macro-economic trends tend to be evened out. For this reason, it is argued that the figures in the strategy provide a realistic indication of the quantum of 'retail floorspace need' over the next eight years.

These figures are inclusive of retail commitments as of September 2007 (i.e. existing grants have not been subtracted) and set a quantitative floorspace need based on projected population growth in the GDA as forecast by the RPGs and the NSS³. Increased population growth or increased economic activity will create higher levels of quantitative need; just as falling population and weak economic circumstances will reduce levels of need.

The calculation of need within each County is also based on existing market shares and flows from adjoining zones (both within and outside the GDA). Adjustments are made to these patterns of market shares to reflect the desired impacts of the delivery of the retail strategy up to 2016 such as promoting more localised retail provision, a reduction in travel distances, more sustainable transport modes, improvements in public transport and the delivery of the NSS and RPGs - within a reasonable framework. To this effect and given the high levels of expenditure leakage outwards from within some counties, the GDA Strategy considers that it will not be possible to fully redress this leakage within the timescale of the Strategy - particularly in light of the long lead-in times required to bring in well located, high quality comparison retail space. In the interests of sustainable development, and to cut down on the quantum and length of car based journeys, it is the aim of the Strategy that this leakage will be actively reduced during the lifetime of the Strategy through the improvement of key major town/county town centres. Achieving the long term goal in the Strategy of each Level 2 centre holding its own market requires a vision for retail in these towns that will extend beyond the life of this Strategy. For this reason planning permissions may need to be granted for floor areas in excess of those stated above within the timescale of this strategy, but where the latter phases or particular schemes will not necessarily to be completed and trading until the period beyond 2016.

The *Retail Planning - Guidelines for Planning Authorities (DoEHLG 2005)* guidance document advises that Retail Strategies should "assess the broad requirement for additional development over the plan period... these assessments of future retail requirements are intended to provide **broad**

² This is on the basis on a number of assumptions including 20% of the floor area of developments built since 2001 being devoted to retail service uses and all existing retail floorspace continuing to trade viably even when additional space is built.

³ The population forecast utilised in the GDA Retail Strategy is growth in the GDA to 1.967m persons in 2016. This is however higher than the recently published DoEHLG 2016 target of 1.955m, which it utilised in Chapter 4 of the County Development Plan.

*guidance as to the additional quantum of convenience and comparison floorspace provision. They should not be treated in an **overly prescriptive** manner and should not seek to inhibit competition".* For this reason it is not the intention of the GDA Strategy to present the figures as some form of cap on retail permissions for each Council, but to guide the scale of overall provision of retail; whilst taking into account the need to provide more local retail to reduce long distance travel for lower order shopping and encourage local provision of regular shopping needs.

3.4 Allocation

Convenience allocation - Convenience floorspace by its nature should be provided locally to meet the needs of communities. Provision of new convenience in a Council area may in particular circumstances exceed the figures projected by the GDA Strategy to reflect the needs of localised larger developments and/or qualitative revitalisation (incorporating the suitable and adequate provision of public facilities); whereas in other areas of population decline, such growth is often counterbalanced by either redevelopment of older declining centres to other uses or through reduced trading levels and changes of uses of units from retail to other services. Therefore, in the interests of proper sustainable planning, **due regard** shall be given to the estimates of need for convenience for each County; while the provision of new convenience shopping shall also be promoted and encouraged in areas of significant population growth, should that occur, or where there is a locally identified gap in provision and competition. Applications should detail, if justifiable, that their scheme(s) will meet local demand without damaging existing traders, and how it will promote more sustainable travel modes and shorter distances of travel.

Comparison allocation - In relation to comparison goods, reflecting the population growth expected and forecast for the GDA there is a material need for additional retail floorspace to be developed within both the Dublin and Mid East Regions. Provision of all future comparison retail floorspace should take place in accordance with the policy recommendations contained in the GDA Strategy so that new retail will support both the principles of sustainability and the settlement strategy of the Regional Planning Guidelines, as incorporated into the City, Town and County Developments Plans of the GDA. The figures presented are represented as a range - dependent on the volume (if any) of retail warehousing built during the period of the Strategy. Based on current predictions showing reduced demand for new retail warehouses over the coming years, it is expected that the actual figure will be within the higher end of the range shown.

In this context, the County Wicklow Retail Strategy allocates the calculated floorspace need from the GDA Strategy only to settlements in Levels 2 and 3 as levels below this are considered to only meet local shopping needs, the demand for which will be determined at a local level. Allocation is derived from both the data provided in the GDA Strategy and the County growth objectives for the various settlements, as set out in the County settlement strategy. In order to ensure that indicative floorspace need is not overly prescriptive, Table 4 below sets out a range of floorspace need for Levels 2 and 3. It is not expected that retail provision in all settlements will reach the upper end of the range and in fact, such a scenario would result in significant overprovision in the County. However, due to infrastructural constraints some settlements may not reach even the lower end of the range, and therefore it is considered appropriate to allow for the possibility of significant additional retail in the larger towns to make up for shortfall elsewhere.

Overall, the key planning objective of the Wicklow Strategy is to provide for adequate levels of new retail floorspace, without compromising the established retail core to the extent that such areas become blighted and degraded, devaluing not only the properties in these areas, but also the whole Main Street community function, and leaving the public purse to underwrite future regeneration. While this is the foremost aim, planning policy cannot be allowed to stifle innovation and competition. It is acknowledged that most innovation and competition is driven from the convenience sector. The consequences of blight in convenience properties are not as intractable as in comparison, as such sites are often outside the central core, and are generally large enough in their own right to be able to be redeveloped for other uses. Accordingly, the allocation figures for convenience floorspace will be interpreted in a manner to allow for adequate competition and innovation.

Table 4 Indicative floorspace need in County Wicklow up to 2016 (gross)

Level	Town	Convenience sqm	Comparison sqm
Level 2	Bray	5,000-7,500sqm	25,000-35,000sqm
	Wicklow	3,000-5,000sqm	7,000-15,000sqm
Level 3	Greystones	2,000-2,500sqm	7,000-10,000sqm
	Arklow	2,000-2,500sqm	7,000-10,000sqm
	Blessington	2,000-2,500sqm	2,000-3,000sqm
	Baltinglass	1,000-1,500sqm	2,000-3,000sqm
	Newtownmountkennedy	1,000-1,500sqm	2,000-3,000sqm
	Rathdrum	1,000-1,500sqm	2,000-3,000sqm
Total		17,000-24,500sqm	54,000-82,000sqm

(a) Bray

The GDA Retail Strategy estimates that Bray has a comparison goods floor space requirement of c. 14,000sqm (assuming all non-bulky goods) or c. 10,000sqm (assuming all bulky goods)⁴. This County Strategy allows for growth in comparison space of between 25,000-35,000sqm. While this range is above the need identified in the GDA Strategy, Bray is better positioned to expand its comparison retail offer than a number of settlements lower down in the hierarchy and is the major town of the County and therefore it is considered appropriate to allow for substantial growth. Since the survey date (September 2007), approximately 26,000sqm of comparison floor space has been constructed or is awaiting commencement / under construction. Assuming all permitted developments proceed, there will be limited further need for significant comparison retail expansion in Bray up to 2016, other than in the planned expansion area of Fassaroe. It should be noted that c. 95% of this 26,000sqm is accounted for by one development – the Pizzaro development on the former Bray Golf Club lands (which has been granted by Bray TC but is currently on appeal to An Bord Pleanála).

The GDA Retail Strategy estimates that Bray has a convenience goods floor space requirement of c. 3,500sqm and the County Strategy allows for growth in the range 5,000-7,500sqm. Since the survey date, approximately 15,000sqm of convenience floor space has been granted or constructed (assuming up to 8,000sqm (25%) of the permitted Pizzaro development is devoted to convenience use). Assuming all permitted developments proceed, there will be no further need for significant convenience retail expansion in Bray up to 2016 and it would in fact appear that significant over provision has already been allowed. It must however be borne in mind that (a) convenience shopping is generally 'local' in the sense that shoppers tend to favour the closest location for such shopping (subject to market choice in any area), (b) the Golf Club development again accounts for a large proportion of this space and this site is ideally located in the heart of the town and therefore its development would not undermine the overall goal of improved sustainability and (c) the expansion area of Fassaroe will adequate local convenience facilities and (d) a number of assumption have been made about the comparison-convenience breakdown in arriving at this figure.

The area of Fassaroe in west Bray is planned to be developed as an expansion of Bray and the Bray Environs LAP indicates a target of c. 6,000 permanent residents and up to 16,000 employees in the area by 2016. This will necessitate the provision of retail services that provide for the needs of the residents and employees, while not undermining the role of Bray town centre as the principle shopping area in this expanded settlement. In this regard, the Bray Environs LAP gives an indicative figure for retail floorspace of 4,000sqm, to be divided equally between convenience and comparison use.

Therefore the strategy for Bray is:

1. To promote and encourage major enhancement of expansion of retail floorspace and town centre activities in Bray to sustain its competitiveness as a Major Town Centre and leisure destination in the GDA;

⁴ This does not include 20% to be utilised for non-retail services

2. In the event of the delivery of the Pizarro development within the strategy period, no further significant retail permission will be granted other than (i) conversion of non-retail premises in the core area to retail use, (ii) renovation and expansion of existing retail premises in the core retail area, (iii) redevelopment of derelict or brownfield sites in the core and (iv) replacement of existing facilities within the town;
3. Expansion of the retail warehousing sector, either at existing retail warehousing or industrial estate locations, or on new sites to be determined through the local area or town plan process;
4. Rejuvenation of the seafront area through the expansion of retail and non-retail services, particularly targeted at the visitor market and tourism products;
5. To allow for the enhancement of existing neighbourhood retail facilities;
6. To provide for appropriately scaled retail provision in the expansion area of Fassaroe, which provides for the immediate needs of residents and employees of the area but does not undermine the role of Bray town centre as the principal shopping destination in the settlement.

(b) Wicklow Town

The GDA Retail Strategy estimates that Wicklow Town has a comparison goods floor space requirement of c. 10,500sqm (assuming all non-bulky goods) or 7,500sqm (assuming all bulky goods)⁵. This County Strategy therefore allows for growth in comparison space of between 7,000-15,000sqm. Since the survey date (September 2007), no new comparison floor space has been granted planning permission or constructed. There is a notable absence of retail warehousing in Wicklow Town, given its designation as County Town and its role in the settlement hierarchy.

The GDA analysis suggests that Wicklow town is already oversupplied with convenience retail floorspace to the order of 500sqm. Since the survey date (September 2007), another c. 1,400sqm of convenience floor space has been granted planning permission (with only c. 220sqm constructed to date). The GDA figure is clearly anomalous given the projected growth of Wicklow town and its environs, its status as a Level 2 retail centre and the existing quantum of convenience floorspace provision utilised in the calculations (c. 3,500sqm). This may be due to the fact that the retail analysis for Wicklow town included Wicklow town in the same assessment zone as Bray and Greystones, the result being that the zone appeared relatively well served with some limited retail expansion over its entire area. This approach clearly did not take account of the geography of this large zone and the historical draw of certain towns.

In this regard, the County strategy diverges away from the quantitative analysis in the GDA Strategy in order to redress this deficiency; however, the overall assessment of new floorspace need for the County will remain relatively consistent with the GDA Strategy.

Based on the County settlement strategy and population targets for 2016 and taking a catchment zone around Wicklow town encompassing Rathnew, Ashford, Roundwood, Rathdrum and the rural areas in between, it is estimated there may be a future population of up to 35,000 that would be drawn to Wicklow town for shopping. Taking from the GDA Strategy, projected spend per capita in 2016 on convenience goods of c. €3,288 and the assumed convenience sales density per sqm in 2016 of €12,551, it is estimated that there may be potential for c. 9,000sqm of convenience floorspace. Taking away the existing floorspace (c. 3,500sqm), results in a rough estimate of 5,500sqm. This clearly needs to be adjusted downwards for spending that will flow out of the catchment, and therefore 5,000sqm is considered the upper limit for convenience floorspace expansion in Wicklow town.

With regard to comparison floor space (including bulky goods), there is an extant permission for c. 13,000sqm of floorspace, in the form of retail warehousing on Marlton Road (Lusra Teornata). This development has not commenced to date (July 2009) and in the event that this permission is initiated, there will be limited scope for additional comparison space in the town. The residual growth allowed by this strategy will be required to be reserved for non bulky good floorspace in the centre or edge of the core retail area.

Therefore the strategy for Wicklow Town is:

⁵ This does not include 20% to be utilised for non-retail services

1. To promote and encourage enhancement and expansion of retail floorspace and town centre activities in Wicklow to enhance its role and importance as a County Town Centre in the GDA;
2. To strictly control the growth of convenience floorspace to that set out in this strategy;
3. To direct new retail development in the first instance into the town centre and in particular to derelict or under-utilised sites;
4. Only when town centre sites have been discounted shall significant retail provision be considered at edge of centre locations. In this regard, priority will be given to the development of the Marlton Action Area;
5. In the event of the delivery of the Lusra Teoranta retail warehousing development within the strategy period, no further significant retail warehousing permission will be granted other than (i) conversion of non-retail premises in the core area to retail warehousing use, (ii) renovation and expansion of existing retail warehouse premises in the core retail area, (iii) redevelopment of derelict or brownfield sites in the core and (iv) replacement of existing facilities within the town;
6. To develop the retail role of Rathnew at a 'local centre' scale, commensurate with its local catchment and its development as an employment and education hub (having regard to its role vis-à-vis Clermont Campus);
7. To allow for the development of small number of neighbourhood centres in the major growth areas of the settlement.

(c) Other towns

The GDA Retail Strategy provides an estimate of comparison and convenience requirements up to 2016 for the remainder of the County (outside of Bray and Wicklow), but has not broken this down by town. The comparison requirement up to 2016 for the remainder of the County is estimated at c. 33,500sqm (assuming all non-bulky goods) or c. 24,500sqm (assuming all bulky goods)⁶ and the convenience requirement up to 2016 for the remainder of the County is estimated at c.12,000sqm. This has been allocated by Wicklow County Council over the other major towns as set out in Table 10.4 above.

Greystones

This strategy allocates Greystones 7,000-10,000sqm growth on comparison floor space and 2,000-2,500sqm of convenience floorspace. Since the survey date, approximately 3,000sqm of new retail space has been constructed or is awaiting commencement / under construction. It is estimated that c. 1,000sqm of this floorspace may be devoted to convenience use and the remainder to comparison usage. Therefore there is only a need for a further c. 1,500sqm convenience floorspace and 8,000sqm comparison floorspace up to 2016.

While there is a site zoned in Charlesland for a district retail centre of up to 20,000sqm (net) retail floorspace and 16,000sqm (net) retail warehousing, an application for development of this scale in 2007 was rejected by An Bord Pleanála on the grounds of

- a) the out of centre location, distant from the core retail area
- b) the potential adverse impact on the vitality and viability of the existing town centre,
- c) the scale of the retail floor space would be excessive to the designation of Greystones as Level 3 town centre, to serve mainly local needs and would conflict with Retail Hierarchy for the Greater Dublin Area as set out in the Retail Strategy for the Greater Dublin Area 2008-2016
- d) the scale of the development would undermine the retail hierarchy and the designated role of Bray and Wicklow as Level 2 town centres.

In light of the above, the strategy for Greystones is:

1. To promote and encourage enhancement of retail floorspace and town centre activities in Greystones to enhance its role and importance as a Level 3 Town Centre in the GDA in accordance with the allocation set out in this strategy;
2. To direct larger scale new retail development into the identified core area and failing suitable sites being available, to edge of centre sites and identified village centres.

⁶ This does not include 20% to be utilised for non-retail services

3. While there are 8 sites designated in the Greystones/Delgany Local Area Plan as 'village centres', it is not envisaged that all of these will be developed as a neighbourhood or local retail centre having regard to the potential market and their location vis-à-vis the established town centre and other retail sites. Whilst allowing for competition and innovation in the provision of convenience floor space as outlined in 10.3.4 above, assessment of retail proposals will be made on a case-by-case basis, following retail impact assessment.

Arklow

This strategy allocates Arklow 7,000-10,000sqm growth in comparison floor space and 2,000-2,500sqm of convenience floorspace. Since the survey date, approximately 16,500sqm of new retail space has been constructed or is awaiting commencement / under construction (c. 6,500sqm convenience and 10,000sqm comparison). There is a further application for c. 8,400sqm of retail floorspace currently being considered by An Bord Pleanála (The Alps site).

All of the new comparison retail delivered is in the form of non-bulky goods, particularly clothing stores. There is limited retail warehousing available in Arklow, mostly confined to hardware and electrical outlets, which is a notable deficiency given the distance from the Metropolitan Area.

Therefore the strategy for Arklow is:

1. To promote and encourage consolidation and improvement to retailing and other town centre activities in the core area; however, no further significant retail permission will be granted other than (i) conversion of non-retail premises in the core area to retail use, (ii) renovation and expansion of existing retail premises in the core retail area, (iii) redevelopment of derelict or brownfield sites in the core and (iv) replacement of existing facilities within the town;
2. Expansion of the retail warehousing sector, either at existing retail warehousing or industrial estate locations, or on new sites to be determined through the town or local area plan process.

Blessington

This strategy allocates Blessington 2,000-3,000sqm growth in comparison floor space and 2,000-2,500sqm of convenience floorspace. There have been no significant retail developments since the survey date. There are two major convenience shops in Blessington – Supervalu and Dunnes Stores, with the comparison offer is mainly provided by small independent shops on the Main Street, a small number of new shops in the Cookehill development and the comparison element of the Dunnes unit. There are no discount retailers and limited retail warehousing in Blessington.

The strategy for Blessington is:

1. To promote and encourage enhancement of retail floorspace and town centre activities in Blessington, in accordance with the allocation set out in this strategy;
2. To direct larger scale new retail development into the identified core area and failing suitable sites being available, to edge of centre sites;
3. To reserve 50% of the growth allocated to the identified core retail area;
4. To facilitate the development on a discount food store in the town;
5. Expansion of the retail-warehousing sector, either at existing retail warehousing or industrial estate locations, or on new sites to be determined through the local area plan process.

Baltinglass

This strategy allocates Baltinglass 2,000-3,000sqm growth in comparison floor space and 1,000-1,500sqm of convenience floorspace.

There are a number of convenience shops in Baltinglass and a quite a significant number of comparison shops in the core town centre, giving the town a good retail offer. There have been no significant retail developments since the survey date, although there is extant permission for c. 2,000sqm convenience floorspace and 900sqm of comparison floorspace, including a supermarket of c. 1,300sqm. There are no discount retailers or retail warehouses in Baltinglass and given its catchment and distance from a major town centre, it is considered that these formats of retailing

should be supported, to scale commensurate with the catchment and at appropriate locations that do not undermine the core area.

The strategy for Baltinglass is:

1. To promote and encourage enhancement of retail floorspace and town centre activities in Baltinglass, in accordance with the allocation set out in this strategy and in particular, to facilitate considerable growth in the comparison offer;
2. To direct larger scale new retail development into the identified core area and failing suitable sites being available, to edge of centre sites;
3. To reserve 50% of the growth allocated to the identified core retail area;
4. To facilitate the development of a discount food store, on appropriately zoned land in the town;
5. Expansion of the retail-warehousing sector, either at existing retail warehousing or industrial estate locations, or on new sites to be determined through the local area plan process.

Newtownmountkennedy

This strategy allocates Newtownmountkennedy 2,000-3,000sqm growth in comparison floor space and 1,000-1,500sqm of convenience floorspace. A number of new retail units have been constructed since the survey date in the new town centre development, totalling c. 1,750sqm (1,500sqm convenience and 250sqm comparison). The bulk of the convenience space is taken up by a 1,350sqm supermarket constructed, but to date unoccupied. While there is another current permission for 750sqm retail space on a vacant site adjacent to the Kilcoole Road junction, this development does not appear to be proceeding.

There are no discount retailers or retail warehousing in Newtownmountkennedy and given its size, role in the hierarchy and proximity to the major centres of Greystones and Bray, it is not considered that the provision of this format of retail is necessary in this settlement.

The strategy for Newtownmountkennedy is:

1. To promote and encourage enhancement of retail floorspace and town centre activities in Newtownmountkennedy, in accordance with the allocation set out in this strategy and in particular, to facilitate considerable growth in the comparison offer;
2. To require any new retail development to be located in the core retail area and to support applications for conversion / rejuvenation of existing properties along the Main Street.

Rathdrum

There is one supermarket in Rathdrum (c. 350sqm) and a number of smaller shops on the Main Street, but overall the retail offer is very limited in scale and range and the large 'weekly' shop would be carried out elsewhere in the County, with Wicklow town being the nearest large settlement. This weak offer will not meet the needs of the population of Rathdrum, if it is to grow to its 2016 target of 3,000 persons. Therefore this strategy allocates Rathdrum 2,000-3,000sqm growth on comparison floor space and 1,000-1,500sqm of convenience floorspace.

There have been no significant retail developments since the survey date, although there is extant permission for c. 2,000sqm of retail floorspace in a single development (Market Square redevelopment), mostly made up of smaller retail units and one 300sqm unit. The design and location of the smaller units would however allow for merging into larger units.

There are no discount retailers or retail warehouses in Rathdrum and given its size, role in the hierarchy and proximity to the major centres of Wicklow, it is not considered that the provision of this format of retail is necessary in this settlement.

The strategy for Rathdrum is:

1. To promote and encourage enhancement of retail floorspace and town centre activities in Rathdrum in accordance with the allocation set out in this strategy and in particular, to facilitate considerable growth in the comparison offer;
2. To control the scale of retail development in Rathdrum in accordance with the allocation set out in this strategy and in particular, to facilitate considerable growth in the comparison offer;
3. To require any new retail development to be located in the core retail area and to support applications for conversion / rejuvenation of existing properties along the Main Street.

4.0 Retail Objectives

4.1 General

- RT1** Applications for new retail development shall accord with '*Retail Planning Guidelines for Planning Authorities*', (DoEHLG 2005) and any subsequent Ministerial guidelines or directives.
- RT2** Applications for new retail development shall accord with the County Retail Strategy and where necessary, shall be accompanied by a Retail Impact Assessment (refer to Section 5 of this strategy)
- RT3** The preferred location for new retail development where practicable and viable, is within a town centre (or 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 the 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 which is within an easy and convenient walking distance from the primary shopping core of a town centre. The distance considered to be convenient will vary according to local circumstances but typically is unlikely to be much more than 300-400m from the edge of the prime shopping area and less in smaller settlements.
- RT4** There will be a presumption against large retail centres located adjacent, close to, or on a high speed route directly to existing, new or planned national roads/motorways. Such centres can lead to an inefficient use of costly and valuable infrastructure and may have the potential to undermine the regional/national transport role of the roads concerned. However, as a limited exception, large retail warehouses may be considered for locations close to such road networks where the proposed development would be situated where the road network has sufficient capacity to cater for the scale of development proposed.
- RT5** The 'sequential approach' to the location of new retail development will be applied i.e. having assessed the size, availability, accessibility, and feasibility of developing both new sites and existing 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.
- RT6** Regard shall be taken of the indicative floorspace need set out in Table 10.4 in the assessment of new retail applications in Levels 2 and 3 of the retail hierarchy. No single application shall be allowed to absorb more than 75% of the indicative allocation for that settlement.
- RT7** Any change of use of retail facilities from their current use to Health Shop / Head Shop or any similar activity will require a change of use planning permission prior to the use taking place

4.2 Town centres (Levels 2, 3 and 4 of the Wicklow retail hierarchy)

- TR1** Shopping provision is a key component of town centres, and makes a major contribution to their vitality and viability. It is important therefore that they retain retailing as a core function. Where an application is made for a new development with street frontage either in the defined retail core of a larger settlement or on the 'Main Street' of a smaller town, retail or commercial use will normally be required at street level.
- TR2** The mix and balance of different type of retail (including retail services) is important to attract people to these centres, and to ensure town centres remain the main meeting point for the community. Too many of certain types of outlet can destroy the balance of the town centre, and accordingly the Planning Authority will control the number of bookmakers, off-licences

(including off-licences in convenience stores), financial institutions, and other uses that can adversely affect the character of a town centre.

- TR3** In order to sustain and enhance the vitality of town centres, active 1st floor uses will be required in all new developments and particular encouragement will be given to 'living over the shop'. Where such use is proposed, a relaxation in density, car parking and open space standards will be considered, where the development meets very high quality of design and accommodation.
- TR4** New retail developments in town centres will be required to provide proximate and easily accessible car parking or to make a financial contribution towards car parking where it has been or will be provided by the Local Authority. Access to public transport services (where available) shall be provided which may include the provision of new bus stops with the agreement of service providers and shelters / waiting areas.
- TR5** Applications for new retail developments in town centres shall make every effort to integrate successfully new retail development, much of which will be of a scale larger than the existing urban grain, into the townscape of existing centres. Attention shall be given to the location of service yards and treatment of car parking areas so as to avoid unsightly views and special consideration shall be given to the detailing of extensive frontages and flank walls.
- TR6** Where new retail development is considered 'large scale' in relation to the existing town centre, the onus is on the applicant to demonstrate compliance with the development plan and that there will not be a material adverse impact on the vitality and viability of any existing town centre. In submitting evidence in relation to retail impact the applicant shall address the following criteria and demonstrate whether or not the proposal would:
- support the overall strategy for town centres as set out in the development plan and not materially diminish the prospect of attracting private sector investment into one or more town centres;
 - cause an adverse impact on one or more town centres, either singly or cumulatively with recent developments or other outstanding planning permissions, sufficient to undermine the quality of the centre or its role in the economic and social life of the community;
 - diminish the range of activities and services that a town centre can support;
 - cause an increase in the number of vacant properties in the primary retail area that is likely to persist in the long term;
 - ensure a high standard of access both by public transport, foot and private car so that the proposal is easily accessible by all sections of society;
 - link effectively with an existing town centre so that there is likely to be commercial synergy.
- TR7** Where an application for new retail development is made within the defined core retail area of a **major** town or **County** town centre 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.
- TR8** Positive consideration shall be given to the re-configuration of existing retail provision in Levels 2 and 3, to accommodate large modern retail units.

4.3 District centres

- DC1** New district centres shall generally only be considered within the built up area of major conurbations or in the suburbs of large towns. At such locations, the applicant will be required to show that;
- the location of the development is sufficiently separated from the core retail area of the settlement as to warrant new retail facilities;
 - the retail development is located and sized to meet the needs of the new development without impacting on the viability of the existing town centre;

- the range of retail and non-retail services to be provided is appropriate to the needs of the area;
- all efforts have been made to integrate the district centre with any new community facilities due to be provided as part of the scheme e.g. schools, childcare facilities, sports fields etc.

4.4 Large foodstores

Large foodstores comprising supermarkets, superstores or hypermarkets are an accepted component of the retail hierarchy. They serve mainly the large weekly convenience goods shopping requirements of families. They require large clear areas of floorspace together with adjacent car parking as the majority (but not all) of families undertake their weekly bulk convenience shopping by car.

- LF1** Large foodstores shall be required to be located on suitably zoned lands in town centres or on the edge of the centre where public transport provision can be made available for shoppers.
- LF2** Where a proposal for foodstore development involves the sale of a significant amount of non-food goods (as is common in hypermarkets) the application drawings accompanying a planning application shall delineate clearly the area to be devoted primarily for the sale of convenience goods. Floorspace caps set out in the *Retail Planning Guidelines* will apply to the total net retail sales space of superstores and the convenience goods net retail sales space of hypermarkets delineated on application drawings. To prevent any adverse impact on town centres, the proportion of comparison goods floorspace shall be limited to a maximum of 20% of retail floor area.

4.5 Neighbourhood centres

- NC1** New / **expanded** neighbourhood centres shall generally only be considered in areas of significant residential **development** / expansion on the edges of settlements in Levels 2 and 3 of the retail hierarchy. At such locations, the applicant will be required to show that;
- the scale of the **existing** / new residential development is such to sustain a neighbourhood centre;
 - the retail development is located and sized to meet the needs of the **existing** / new development without impacting on the viability of the existing town centre (total retail floorspace in excess of 500sqm shall not generally be considered **outside of the growth centres of Bray, Greystones, Wicklow and Arklow**);
 - the location of the development is sufficiently separated from the core retail area of the settlement as to warrant new retail facilities;
 - the range of retail and non-retail services to be provided is appropriate to the needs of the area;
 - all efforts have been made to integrate the neighbourhood centre with any **existing** / new community facilities due to be provided as part of the scheme e.g. schools, childcare facilities, sports fields etc.

4.6 Out of town shopping centres

This is defined as an out-of-centre development on a green field site, or on land not clearly within the current urban boundary.

- OT1** There shall be general presumption against out of town shopping centres.

4.7 Village retail

VR1 Small scale retail development appropriate to the scale and needs of the settlement and its catchment will be positively considered subject to the following control criteria:-

- such shops shall be located in the core retail area of the village (if one exists) or the traditional historical village centre; out of centre locations will not be considered suitable for new retail;
- new development shall be designed with the utmost regard to the historical pattern of development in the village and prevailing village character, with particular regard to building form, height and materials and shall generally be required to incorporate a traditional shop front.

4.8 Rural retail

RR1 Rural shops, not connected (either functionally or spatially) to any settlement shall not be considered other than

- a small (not exceeding 100sqm) farm shop or shop ancillary to activities arising from farm diversification;
- a small (not exceeding 100sqm) shop ancillary to a craft workshop, retailing the product directly to the public;
- a small scale (not exceeding 100sqm) shop designed to serve a dispersed rural community, provided this does not undermine the viability of retail facilities in a nearby village or town.

4.9 Tourism retail

TR1 Tourism retail ⁷ shall be encouraged at appropriate and established tourist locations, subject to the following criteria:

- the applicant must show that the tourism attraction concerned is well established and has a suitable existing flow of visitors sufficient to make a retail facility viable;
- the retail facility shall be sufficiently proximate to the tourism facility but shall be suitably located so as to not detract from the feature;
- in order to ensure that the retail unit in itself does not supersede the existing tourist attraction as the main tourism feature of an area, any application for tourism retail in excess of 200sqm shall be required to justify the need for a larger retail unit and to include proposals (to be fully implemented by the retail developer) to effectively link the retail facility to the tourist attraction (both in terms of physical links ⁸ and linkage of the tourism identity / product ⁹)
- the retail facility shall include significant links with the local tourism community in terms of providing a tourist office or tourism information and space for the sale of locally produced goods / crafts.

4.10 Retail warehousing

A retail warehouse is defined as a large single-level store specialising in the sale of bulky household goods such as carpets, furniture and electrical goods, and bulky DIY items, catering mainly for carborne customers and often in out-of-centre locations. Retail parks comprise a single development of a least three retail warehouses with associated car parking.

RW1 New retail warehouse developments and retail parks shall be required to be located on suitably zoned lands in settlements. Where no such zoned lands are provided and a need can

⁷ Tourism retail is defined in this plan as retail space to be utilised principally for the sale of goods to visitors and tourists to an area, mainly of a high quality or luxury items and which would not offer goods associated with normal convenience and comparison shopping and would not be expected to have a large draw / attraction from the local population.

⁸ For example footpaths / cycleways or shuttle bus / jaunting car connections from the retail facility to the tourism feature

⁹ For example joint marketing strategies, co-ordinated signage etc

be shown for this form of retailing, the applicant must show through the application of the sequential approach that the site selected is suitable and optimal.

- RW2** A recent trend in a number of parks has been a blurring of the division between bulky and non-bulky goods retailers, with some parks now containing major clothing chains and food retailers. Continuing to allow this mixing of uses such as fashion chains into retail parks is likely to result in a negative impact on adjoining town centres as the large size units readily available in retail parks are easily accessible by car, but not public transport, and divert trade away from the town core. Therefore where permission is granted for new retail warehouse development, the planning authority shall apply strict conditions on floor size (including restricting internal expansion by the construction of 1st floors or mezzanines), the type of goods to be sold or restricting the subdivision into smaller units.
- RW3** Permission for retail warehouses shall generally only be considered as part of planned retail warehouse parks, which combine access arrangement and car parking.
- RW4** Single retail warehouse units may be considered on infill sites in built up areas and flexibility with regard to the type of goods sold may be considered where the location is easily accessible by foot from the core retail area, the form of development is in keeping with good urban design and the development would not detract from local plan aspirations for the area.

4.11 Discount foodstores

Discount food store generally comprise a single level, self service store normally of between 1,000sqm – 1,500sqm of gross floorspace selling a limited range of goods at competitive prices, often with adjacent car parking.

- DF1** Discount foodstores shall be required to locate on suitably zoned lands and shall only be considered in settlements in Levels 2 and 3 in the County retail hierarchy. Where no such zoned lands are provided and a need can be shown for this form of retailing, the applicant must show through the application of the sequential approach that the site selected is suitable and optimal. To prevent any adverse impact on town centres, the proportion of comparison goods floorspace shall be limited to a maximum of 20% of retail floor area.

4.12 Regional shopping centres

These are out-of-town retail malls generally of 50,000sqm gross retail floorspace or more, typically enclosing a wide range of clothing and other comparison goods with extensive dedicated car parking. Regional shopping centres have not normally in the past incorporated retail warehouses, but this is not exclusively the case.

- RS1** There shall be general presumption against out of town regional shopping centres

4.13 Outlet centres

This is defined as a group of shops, usually in out-of centre locations, specialising in selling seconds and end-of-line goods at discounted prices. Such centres generally have a regional market and draw customers from a wide catchment. The specialist nature of these outlets differentiates them from the more general regional shopping centres described in Section 4.12 above.

- OC1** There shall be a general presumption against out-of-town regional shopping facilities; however, specialist outlet centres may be considered where the following criteria are met:
- the developer can show through rigorous retail impact assessment that the proposed centre will not divert trade from either the City centre or major / County towns and that the centre will not absorb such a quantum of retail floorspace in the County so as to undermine the continued growth and viability of existing County settlements;

- the site is located contiguous to a higher order town (i.e. Levels 1-3) and is not located in an isolated rural area, distant from major centres of population;
- the site is located where **existing** frequent public transport is available or where a short shuttle type connection can be made to rail or light rail system (to be funded by the developer);
- the retail facility shall be designed, developed and managed to provide opportunities for synergy with the local economy in terms of providing for links to local businesses or tourism in the area.

4.14 Factory shops

FS1 Factory shops (i.e. as a shop adjacent to the production unit and specialising in the sale of manufacturers' products direct to the public) shall be positively considered where the following criteria are met:

- the zoning of the site specifically allows for this use or in the case where the relevant local plan does not make reference to factory shops, the shop is strictly ancillary to the main production activity on the site;
- additional car parking (over and above that required by the manufacturing facility alone) is available or can be provided for shoppers.

4.15 Garden centres / nurseries

GC1 Garden centres (i.e. the use of land, including buildings, for the cultivation, storage and/or the display and sale of horticultural products and the display and sale of related goods and equipment) shall generally be required to locate on zoned land in settlements. Garden centres shall only be considered outside settlements where it can be shown that the principle activity is the cultivation of plants and the retail activity is purely ancillary to the main use. In such cases, retail space shall not be expected to exceed 500sqm (indoor and outdoor retail sales area) and car parking shall be restricted to that strictly required to serve the permitted retail area.

4.16 Petrol filling stations

PF1 Notwithstanding the sequential approach, a shop of up to 100sqm of net retail sales area may be allowed when associated with a petrol filling station. Where retail space in excess of 100sqm of net retail sales area associated with petrol filling facilities is sought the sequential approach to retail development will apply, i.e. the retail element of the development shall be assessed by the planning authority in the same way as would an application for retail development (without petrol filling facilities) in the same location.

4.17 Farmer's Markets

These are generally temporary short term (e.g. of single day or weekend duration) public markets at which farmers and often other vendors sell produce directly to consumers. In Ireland this has evolved to include fish, processed meats and foodstuffs, clothing products and crafts, and hot food for immediate consumption.

FM1 Positive consideration will be given to applications for farmer's markets in towns and villages where the development accords with good planning principles, in particular:

- suitable access and car parking arrangements being made for sellers and purchasers;
- suitable pedestrian and vehicular circulation being maintained in the town/village for the duration of the market;
- a suitable degree of visual amenity being provided with regard to positioning and design of stalls and ancillary facilities including waste storage;
- any impacts on residential amenity being minimal and short term.

5.0 Criteria for the assessment of retail developments

Applications for new retail development shall be assessed against a range of criteria, as set out to follow. All applications for retail development will be required to show how the development complies with these criteria. Where

- the development exceeds 5,000sqm in a Level 1 or 2 centre
- the development exceeds 2,500sqm in a Level 3 centre
- the development exceeds 1,000sqm in a Level 4 centre
- the development exceeds 500sqm elsewhere

this information will be required to be provided by the applicant in the form of a Retail Impact Assessment (in accordance with the Retail Planning Guidelines and emerging best practice).

The Planning Authority may however require full or partial RIA as may be specified at pre-planning stage for any development below these thresholds where it is perceived that local circumstances require an assessment to be carried out.

5.1 The need for the development

The need for additional retail will be evaluated against the population of the catchment area to be served by the proposed new retail development and the availability of existing retail within that zone.

All applications for new retail **in excess of** the following limits (**other than sites within the defined core retail area**) will be required to submit an assessment¹⁰ setting out (a) the catchment area for the new development (generally based on proximity and travel time, given the nature of the retailing proposed), (b) an estimate of the catchment population, (c) an estimate of available expenditure for that type of retailing within the catchment, (d) the quantum of similar retail floor space within that catchment

Hierarchy level	Convenience	Comparison
2	1,000sqm	2,000sqm
3	1,000sqm	2,000sqm
4	500sqm	1,000sqm
5	200sqm	500sqm
Outside Levels 1-5	200sqm	500sqm

5.2 The sequential approach

Having evaluated 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 shall 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.

When making planning applications, retail developers must be adaptable and flexible in appraising potential sites and buildings and should be prepared to make reasonable compromises and, if possible, adapt standard development formats in order to accommodate retail schemes on sites, which are well located in relation to the sequential approach to retail development.

In this regard, all applications for new retail **in excess of** the limits set out in Section 5.1 (**other than sites within the defined core retail area**) will be required to submit an assessment¹¹ detailing:

- a) the location of the proposed development vis-a-vis the core retail area of the town or settlement (as set out in this retail strategy) or other lands in that settlement zoned for retail or other commercial / mixed use,

¹⁰ Which may or may not form part of a full Retail Impact Assessment, depending on the scale and location of the proposal

¹¹ Which may or may not form part of a full Retail Impact Assessment, depending on the scale and location of the proposal

- b) where the application is for development in a town / settlement for which no core retail area has been identified or where no local plan exists showing the designated 'town centre' area, the location of the traditional / historical centre of the settlement and the location of other retail units
- c) where the proposed development is not located in a suitable centre, edge of centre or zoned site, full explanation of the reasons why such sites are not suitable, viable or available and an assessment of trade draw away from the established core that would occur were the development to proceed

5.3 Impact on existing centres

New retail developments can have an adverse impact on the vitality and viability of established town centres. This is a consequence of the competitive environment in which retailing operates. Though it is not the purpose of the planning system to prevent competition, proper planning and development includes promoting healthy town centres, in the public interest. Where new developments compromise this planning goal, permission shall not be considered.

In this regard, applications for new retail **in excess of** the limits set out in Section 5.1 (**other than sites within the defined core retail area**) will be required to submit an assessment of the likelihood of a material adverse impact on the vitality and viability of existing town centres, which shall address

- a) any impact the development would have on the overall strategy for economic development, settlement growth and town centres as set out in the development plan (including any impact on the wider economy and rural areas)
- b) the physical and functional links between the proposed development and the existing town centre; in particular vehicular and pedestrian linkage and commercial synergy
- c) any cumulative impact the proposed development would have on an existing town centre, taken in conjunction with recent developments or outstanding permissions and whether any impact would be sufficient to undermine the quality of the centre or its role in the economic and social life of the community
- d) any impact resulting from the development on the range of activities and services that a town centre can support, including any increase in vacancy in the primary retail area that may result.

5.4 Availability of transport

Retail development is most accessible to customers where it is well located within its catchment area and is accessed both by public transport and the private car and ideally, also by foot. Retail development should also be in such location that allow for multi-purpose shopping, business and leisure trips on the same journey.

In line with the principle of sustainability, it is desirable that 'daily shopping' which encompasses convenience, specialty and retail service shopping such as supermarket, chemist, florist, news agency, dry cleaner, off-licence/ wine store and hairdresser, should be 'walk to' or accessible by public transport. The reality is, however, that most shoppers, especially families, do not have the luxury of daily shopping and will do one or two big shopping trips per week, necessitating the use of private transport, especially in more rural areas and in urban areas where there is a lack of competitive food stores.

In this regard, all applications for new retail **in excess of** the limits set out in Section 5.1 will be required to submit an assessment¹² detailing:

- a) the location of the proposed development vis-a-vis existing transport networks (road, rail, cycleways etc)
- b) the scale and type of retail proposed, the principal transport method likely to be required to avail of the service and the facilities required to be provided as part of the development to facilitate the suitable transport of people and goods

¹² Which may or may not form part of a full Retail Impact Assessment, depending on the scale and location of the proposal

- c) how the development can be considered sustainable (both environmentally and socially) given the proposed location and likely principal transport method and what actions are to be put in place by the developer to improve accessibility by sustainable means

Applications for out of town retail developments shall be accompanied by a transport assessment showing how trips to and from the proposed development might affect the road network and public transport links. If the proposed development warrants an environmental impact assessment, the transport assessment shall form part of the EIS.

5.5 The qualitative aspects of the proposal, including scale, ~~including scale~~

~~Chapter 5 of this plan sets out the requirements of the Council with regard to urban form, building scale, height and other qualitative parameters.~~

Town / village centre sites

New / expanding retail developments in town / village centres should have regard to the design standards set out in either the County Development Plan or the relevant applicable local plan.

Edge of centre / out of centre sites

Such sites by their nature often cannot draw design reference from their immediate surroundings, with the environs often comprising undeveloped land or lower density 'edge of centre' type housing developments. The key issue here is the provision of a new development that produces a high quality environment that fits with its surroundings, and does not detract from the established residential and visual amenities of the area. The following criteria will be required to be addressed in any such development:

- notwithstanding the scale of development warranted with regard to any retail assessment carried out, the size of such development should reflect its surroundings and not appear monolithic or excessively bulky vis-à-vis the surroundings. In this regard, height, footprint and overall mass / bulk must be carefully considered;
- The impact of the building on its surroundings must be carefully considered, in particular possible overlooking and overshadowing of adjacent residences, excessive dominance in the (urban) landscape or other negative impacts on residential or visual amenity;
- The provision of a new retail structure at an 'edge of centre' or 'out of centre' location will result in the introduction of a new architectural form in the area and the design should be of the highest quality in recognition of this. Design should be innovative, interesting and should be informed by the place and time. Formulaic or 'pattern book' designs should be avoided and each development should be unique to its surroundings;
- The designs and building format should aim to incorporate as many 'active' facades as possible and blank facades should not be visible to public areas. Materials and finishes utilised should be appropriate to the location and buildings with an excessively industrial appearance i.e. metal / industrial panel finishes, lacking in fenestration etc will not normally be accepted;
- Sustainable or 'green' design principles should be employed that allow for a reduction in energy / water usage and waste in the development;
- Delivery / storage areas should not be located directly adjoining residential areas, due to potential impacts from lighting and noise. However, such areas should be located out of public view through appropriate positioning or acceptable screening treatment;
- The treatment of boundaries should address the surroundings and security / industrial type boundaries will generally not be accepted;
- Entrances (vehicular and pedestrian) should be attractive as well as functional and should provide for a high degree of permeability from the surrounding area;
- Signage should be appropriate to the location and scale of the development and overly large, excessively illuminated or inappropriately located signage will not be considered

6.0 Retail and shopfront design standards

These shopfront design standards are drawn from the '*Guidelines for Shopfront Design in Bray*' (Bray Town Council / Colm O'Broin & Partners 2007), and although this document was drawn up for the Bray, for the most part its guidance is relevant to all settlements in the County and reference should be made to this document in the designing of any new shopfronts. The function of the shopfront is two-fold; to identify a retail premises within a street by way of name, signage and window display and to express the architectural character of a building at ground floor level.

Elements of shopfront design

6.1 Shopfront style

The shopfront is part of the building and the building is part of the street. Where a shopfront is to be installed, it should normally be of materials or finishes appropriate to the age, style and character of the building and its surrounding area.

While contemporary design is generally encouraged, in settlements or areas with very traditional shopfront formats, a traditional style shopfront may be the most appropriate solution. However, at locations where there are a range of shop front styles, and no common vernacular, a modern solution is preferred over inaccurate historical representations

6.2 Fascia

The primary function of the fascia is to advertise the name of the shop. The fascia also gives visual support to the upper floors and helps frame the shop window.

The fascia should be of an appropriate height, in scale with the overall height of the shopfront and other elements of the building. A failing of many modern shopfronts is the application of overlarge and inappropriate fascias, superimposed on the front of originals and obscuring such detailed elements as consoles and cornices. The fascia should not encroach on or above first floor level or extend uninterrupted across a number of buildings.

6.3 Signage

- Signage shall generally be limited to the fascia, but may also be considered on or behind glazing and on columns or doorways.
- Lettering is to be in proper proportion to the size of the fascia and to the scale of the building. As a general rule, the lettering should be restricted to half the fascia width, taking care to leave sufficient space at top, bottom and sides. Shop lettering should convey the essential message of the retailer. The shop name alone will generally have most effect.
- Each shop should have its street number displayed. This could be included as part of the fascia, on glazing above the door, or on the door itself.
- Generally, individually mounted lettering or handpainted lettering will be required.
- Sandwich boards will not be permitted as they can give the appearance of clutter in the townscape and can be a hazard to the disabled and visually impaired if not carefully designed and positioned.
- The illumination of shopfronts and signage is generally considered unnecessary. In certain circumstances, for example where the business is open in the evening, modest levels of discreet lighting (the purpose of which is to light the lettering and not bathe the whole façade and pavement in a pool of light) may be permitted.

6.4 Doors & windows

- Shop windows should be set in the same plane as the building front with any recessed areas being confined to the entrance door.
- Frosted glazing rather than solid signage should be used where the use requires a degree of privacy (e.g. non-retail services such as solicitors, surgeries etc) or where the layout of the shop requires functional elements or shelves to be located directly behind the window;

- Access should be made easy for everybody including those in wheelchairs or with other aids to mobility; the visually impaired; parents with pushchairs and young children; the elderly and those carrying heavy bags. Shopfronts should be designed with level access at pavement level. Where this is impossible, a ramp rather than steps must be provided.

6.5 Canopies

- The use of awnings will be considered provided these are not installed principally as a means of increasing advertisement space.
- New awnings are most effectively positioned below the fascia and between the pilasters as this means the shop name will not be hidden. Awnings should always be retractable and ideally made of canvas or similar materials.
- Generally the colour chosen should be subdued as bright or gaudy colours will often jar with neighbouring shops and undermine the quality of the street scene.

6.6 Materials

- Materials used in shopfront construction should be of good quality, durable, and should respect the age and character of the building and adjoining street.
- Timber is an appropriate material for shopfront construction, it is versatile, durable, easily and cheaply maintained or altered. Modern materials such as aluminium and plastic may be considered for contemporary shopfronts. Other high quality materials such as marble, terrazzo, bronze or chrome might also be suitable for use in such locations.
- The number of different materials shall be minimised, as too wide a range can result in a confused or chaotic appearance.
- The integration of existing materials with modern materials is recommended, creating a balance of finish and texture and establishing a sense of permanence in contemporary design. Historic robust materials such as granite, limestone, brick, timber, cast iron, brass and copper can be integrated with lightweight contemporary materials such as stainless steel and glass.

6.7 Colour

- When considering the colour of new or replacement shopfronts it is important that the selected colour scheme complements the character and style of the building, rather than conflicting with it. Shopfronts are traditionally painted in strong colours, which are slow to fade. The use of rich colours, such as dark shades of green, blue, red and black is recommended.
- Corporate colours should be restricted to the main signage of the shopfront and not the entire shopfront.

6.8 Security

- Solid external shutters which completely cover the shopfront when closed have a major impact on the street scene and therefore will not be permitted;
- Where there is an obvious need for enhanced security, the use of alternative methods of protection should be considered, for example:
 - toughened / laminated glass, which incorporates a plastic interlayer and can remain intact even when broken;
 - additional glazing bars reduce glazing size, thus strengthening glass area and reducing opportunities for theft;
 - internal open-mesh window grilles, fixed inside shop windows behind glass, allow views into the shop even after hours and give a less fortified appearance than external grilles.
- Alarm boxes should be as unobtrusive as possible. If the box is to be positioned on the shopfront, then aesthetically the best position is usually at a corner of the fascia. The box must be painted to suit the shop colour scheme. Wiring should be integrated and redundant wiring removed.
- Appropriate use of lighting may reduce the likelihood of a break in. The lighting should generally not be so strong as to illuminate the area outside the shop, as this might affect the character of the area.

- The use of upper floor for residential use is an effective way of improving security. Having a constant presence over the premises is one of the most efficient ways of reducing crime and vandalism and often involves little alteration which might affect the character of the building.

6.9 Vacant retail units

Vacant properties have a very negative impact on our town centres - visitors and shoppers can be discouraged from return visits, the look and feel of the town centre is one of decline, the retail offer is weakened and investment stagnates. In this regard, it will be condition of the grant of permission for any new or extended / refurbished units that at all times that the retail unit is not in active use, the street front display area will be required to be provided with an attractive temporary display or professionally designed artwork affixed to the glass frontage. The temporary use of the retail space during such times for creative, cultural or community purposes will be encouraged; however, such change of use may require planning permission, and advice will be provided by the Council on a case by case basis in this regard.