



RETAIL STRATEGY

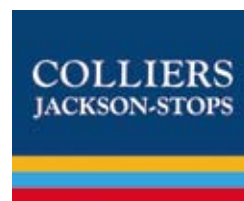
FOR THE GREATER DUBLIN AREA

2008-2016

RETAIL STRATEGY FOR THE GREATER DUBLIN AREA

2008-2016

Regional Planning Guidelines Office,
Dublin and Mid-East Regional Authorities.



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This Strategy was prepared by the Dublin and Mid-East Regional Authorities in conjunction with Dublin City Council, Dun Laoghaire Rathdown County Council, Fingal County Council, South Dublin County Council, Meath County Council, Kildare County Council, Wicklow County Council and the Department of Environment, Heritage and Local Government working with Colliers CRE Retail Research Consultancy & Colliers Jackson Stops.

July 2008

(Please note that all figures contained in this report are dated from the baseline of September 2007)

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Individual Appendices available on request from the RPG office





Executive Summary

Revised Retail Strategy
for the Greater Dublin Area

Executive Summary of the Revised Retail Strategy for the Greater Dublin Area

The purpose of the retail strategy is to guide the activities and policies for retail planning across the seven Councils which make up the Greater Dublin Area- Dublin City, Dun Laoghaire Rathdown County, Fingal County, South Dublin County, Kildare County, Meath County and Wicklow County Councils. The Dublin and Mid-East Regional Authorities decided to undertake a review of the 2001 Greater Dublin Area Retail Strategy due to the many policy, economic and population changes that have taken place since 2001. New policies were adopted which impact on the Retail Strategy including inter alia, the National Spatial Strategy (NSS), the Regional Planning Guidelines (RPGs), the National Development Plan (NDP) and the revised Retail Planning Guidelines. Alongside this, the levels of economic and population growth experienced, as well as the most recent population projections for the Greater Dublin Area are higher than those used in 2001. In addition, to align with the next series of City and County Development Plans, it was decided to extend the Strategy to 2016.

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 in suitable locations is provided, integrated within existing growth areas and public transport investment, and
- 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 series of policy recommendations which draw 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.

The retail market in the Greater Dublin Area has undergone significant change in the last seven years. Economic growth up until 2007 was very buoyant, but current indicators show a slowing of growth in the Irish economy with a resulting impact on the projected rates of increase in retail sales. Over the last seven years the number of new shopping centres opened within and outside the GDA, the latter impacting on trade flows into or out of the GDA. New retailers have emerged and the market has expanded in both the convenience and comparison sector. Internet sales of goods are increasing in popularity with an expansion of broadband connectivity.

A core part of the review involved a telephone survey of 5,000 households (extending beyond the GDA) and a street sample of tourists and younger persons. These surveys set out the current shopping patterns in the GDA and show spending flows - set out in 28 zones (see **Figure E.1** overleaf). In all the GDA attracts an inflow of €1,529 million of comparison and €209 million of convenience goods and leaks out €263 million of comparison and €193 million of convenience. Retail trading trends show changes to patterns of spending since 2001. Dun Laoghaire- Rathdown is now a net importer of retail, while Kildare has reduced the level of leakage from the county. The Mid-East – particularly Meath and Wicklow, were shown to have maintained high levels of leakage from their Council areas to other areas both within and outside the GDA.

Permissions have been granted for significant volumes of retail which have yet to be built and which have the potential to increase the total floor area of retail in the GDA by 17%. In calculating future need up to 2016 these unbuilt permission 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 plans could be altered or replaced before any works commence.

The second area of the study examined of population projections and their breakdown into each of the 28 zones. Spending pattern growth projections in each zone were modelled. (See report by Experian commissioned for this study in Appendix 5). The spending power of each zone was derived; which when added to the current estimated spending gave future retail spend by zone, based on current trends.

The results gave the aggregate spend available within the GDA by 2016. These monetary figures were then translated into floorspace need. From this the future demand for retail floorspace for both comparison and convenience shopping was calculated by deducting existing floorspace.

To reflect the impact of retail services (non retail uses such as beauticians/banks/coffee shops occupying retail units) the figures were increased by 20%. The figures were subsequently adjusted upwards by a further 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 fully trading until after 2016. This allows flexibility for phasing arrangements, site assembly, or other delays that may emerge. For convenience shopping the overall demand from September 2007 to 2016 is 248,744 sq.m of gross lettable floor space and for comparison shopping a range of 725,900 sq.m. to 989,865 sq.m of gross lettable floor space is projected. (Full detail is shown in tables 5.9 and 5.10 in the main text) A range figure for comparison is provided as the scale of absorption of demand by retail warehousing impacts on the result. The volume of retail shown should be considered within the context of existing granted developments and commitments by Councils in Development and Local Area Plans.

The third and critical part of this study was developing a strategic vision and guidance on retail planning in the GDA, informed by the results of the above analysis on future demand. A core element in setting the strategic approach has been the importance of achieving higher levels of sustainability by (i) encouraging local shopping provision for lower order goods to reduce the lengths of trip generation and (ii) where possible the linking of provision of new retail to public transport nodes. (The emphasis of each element will weigh more to one or the other depending on the rural or urban character of the catchment).

At the core of the Strategy is the revised retail hierarchy for the GDA. (See **Table E.1** overleaf). The hierarchy and policy of the Strategy re-confirms the role of Dublin City Centre as the prime retailing centre for the Greater Dublin Area. The projected demand does not show a need to make significant changes to the hierarchy and therefore, in line with sustainable principles, the hierarchy coincides and re-enforces the Regional Planning Guidelines policies. Energising of county towns and major town centres as important places where retail is one element of their role as multi-functional lively and vibrant places is proposed. Supporting the importance of retail within the main key towns of the GDA is a necklace of spatially balanced lower order centres providing for more regular needs. The Strategy aims to encourage the achievement of more balanced flows of shopping patterns which inform the figures set out within each Council area.

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
- Thresholds for the preparation of retail impact assessments with retail applications are suggested
- 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, and
- 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 Strategy sets out a medium term vision to 2016. This timescale is essential given the significant lead in times for the development of retail schemes, particularly those within built up areas or those affected by infrastructural needs. It is recommended that this Strategy is fully reviewed in six years and a new Strategy prepared. During the life of the Strategy interim update and review monitoring reports should be produced at regular intervals no less than every second year to provide information on the delivery of the Strategy, permissions granted and on possible changes to the population and economic assumptions used.

Table E1: Retail Hierarchy for the GDA

LEVEL 1	METROPOLITAN CENTRE
	Dublin City Centre
LEVEL 2	MAJOR TOWN CENTRES & COUNTY TOWN CENTRES
	Fingal: Swords, Blanchardstown
	South Dublin: Tallaght, Liffey Valley
	Dun Laoghaire: Dun Laoghaire, Dundrum
	Wicklow: Bray, Wicklow
	Meath: Navan
	Kildare: Naas / Newbridge, Leixlip (including Collinstown*)
LEVEL 3	TOWN AND/OR DISTRICT CENTRES & SUB-COUNTY TOWN CENTRES (Not definitive list, see text below)
	Dublin City: Finglas, Northside Shopping Centre, Ballyfermot, Rathmines, Crumlin Shopping Centre, Donaghmede Shopping Centre, Omni, Ballymun, Point Village 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 AND VILLAGES
LEVEL 5	CORNER SHOPS/SMALL VILLAGES

*Leixlip and the Collinstown area will gradually develop along a 20 year time period reaching level 2 status, (see text below in main body of report).

** Dunboyne will gradually develop over the next 20 years towards level 2 status, (see text below in main body of report).

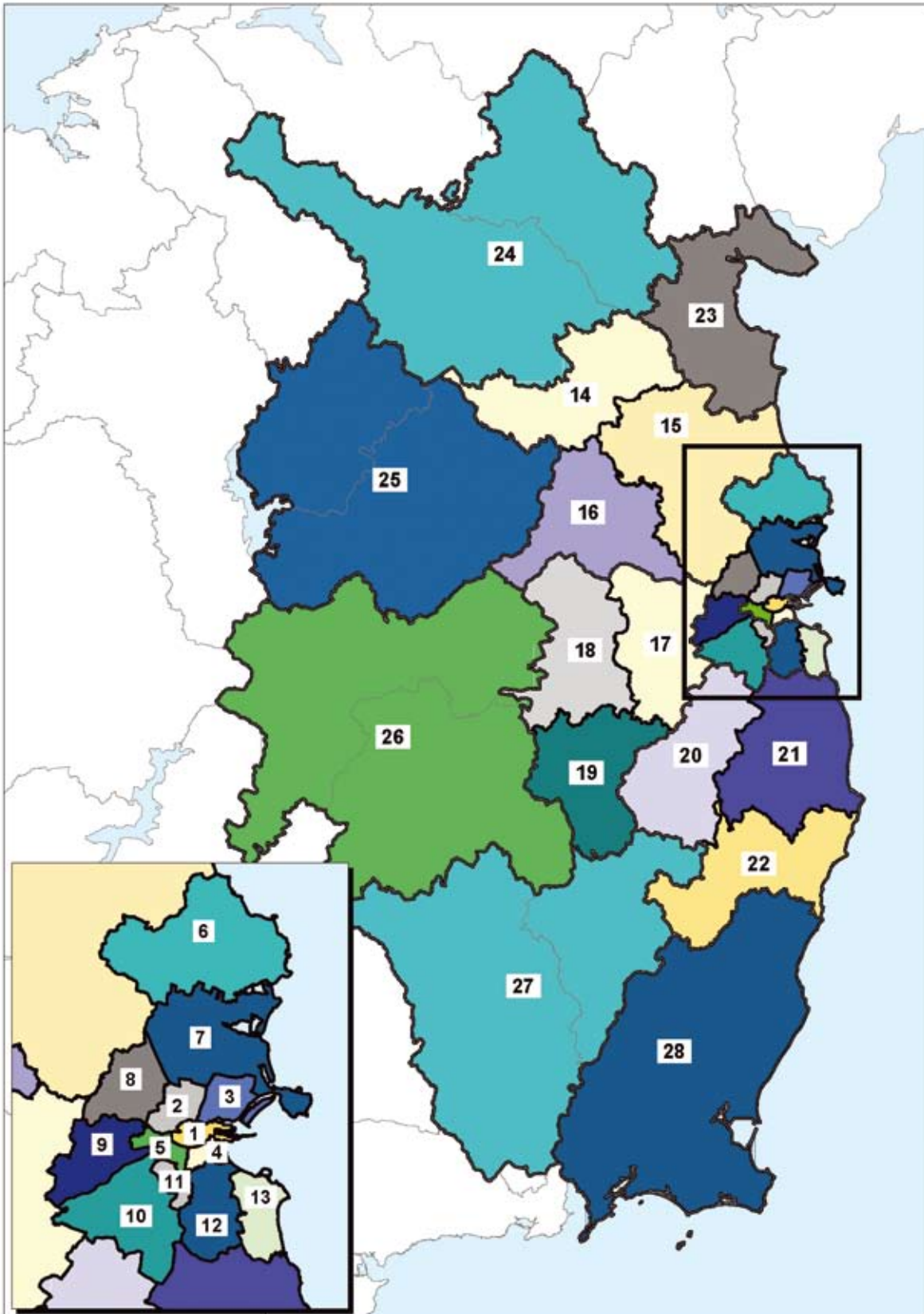


Figure E.1

Map showing 28 Zones used for data collation in Household Telephone Survey







PART 1

Introduction to the Retail Strategy

Introduction

- 1.1 The existing Retail Planning Strategy for the Greater Dublin Area (GDA) was adopted in November 2001 and covered the timeframe of 2001 – 2011, with particular emphasis on the period between 2001 -2006. Since 2001 the Greater Dublin Area has seen significant economic and population growth and a number of new policies launched. The Department of the Environment, Heritage & Local Government (DoEHLG) has published a revised version of the Retail Planning Guidelines (RPGs); the National Spatial Strategy (NSS) and Transport 21 were announced, and Regional Planning Guidelines were adopted for the GDA. In both the Metropolitan and Hinterland areas of the GDA there has been significant expansion in retail- changing the patterns, options and scale of shopping available. In light of these issues, the Councils and Regional Authorities which make up the Greater Dublin Area decided that it was essential that the Retail Planning Strategy were reviewed and updated, extending the time it covered to 2016.
- 1.2 In May 2007, Colliers CRE were instructed by the Dublin and Mid East Regional Authorities to carry out a study of retailing in the GDA to inform the revised Strategy. The study commenced in September 2007. The purpose of the study was (i) to assess the potential capacity for additional shopping floorspace throughout the GDA through to 2016, (ii) to examine the quantitative and qualitative considerations in relation to assessment of need and provision of new retail; and (iii) use the results of this exercise to update the 2001 GDA Retail strategy and to set out policies and recommendations to guide the Retail Strategies and policy initiatives of the Councils.
- 1.3 The GDA (the study area) embraces the two Regions of Dublin and the Mid East. The Dublin Regional Authority area consists of four counties, Dublin City, Fingal, South Dublin and Dun Laoghaire Rathdown Councils; whilst the Mid East Regional Authority area comprises the counties of Meath, Kildare and Wicklow. (see **Figure 1.1**). The population of the GDA in 2006 was 1.662 million, of which 1.187 million (or 71%) were resident in the Dublin region with the balance (0.475 million, 29%) in the Mid East. The population of Dublin City (2006) was 0.560 million and represented 30% of the GDA total. The GDA as a whole accounted for 39% of the population of the Republic of Ireland, which was 4.240 million in 2006. **Figure 1.1** overleaf shows the administrative structure of the GDA.
- 1.4 The main objectives of this study were to review, update and extend to 2016 the existing Retail Strategy for the GDA; and as part of this procedure to provide strategic guidance to promote the development of a vibrant and competitive retail sector, whilst protecting the integrity, vibrancy and viability of existing centres. Key requirements to enable the study were:-
- To carry out an extensive telephone survey of households throughout the GDA and surrounding counties to provide information on shopper behaviour across the area, focusing on quantifying the complex pattern of consumer retail expenditure flows.
 - To carry out the following:-
 - To review economic growth trends and their impact on the future growth in retail expenditure;
 - To collate and analyse data on existing and planned retail floorspace, including developments built since 2001,
 - To carry out a quantitative assessment of the need for additional retail floorspace in the GDA;
 - To take into consideration a range of qualitative issues in order to maximise competition between centres and to promote a broad provision of retail facilities available to all;
 - To provide a breakdown of retail floorspace and consumer retail expenditure.
 - To carry out a review of significant developments in the retail market since 2001;
 - To carry out a series of consultations and to assess, consider and give a synopsis response to all public submissions made both at pre-draft and draft stage of the production of the Strategy.

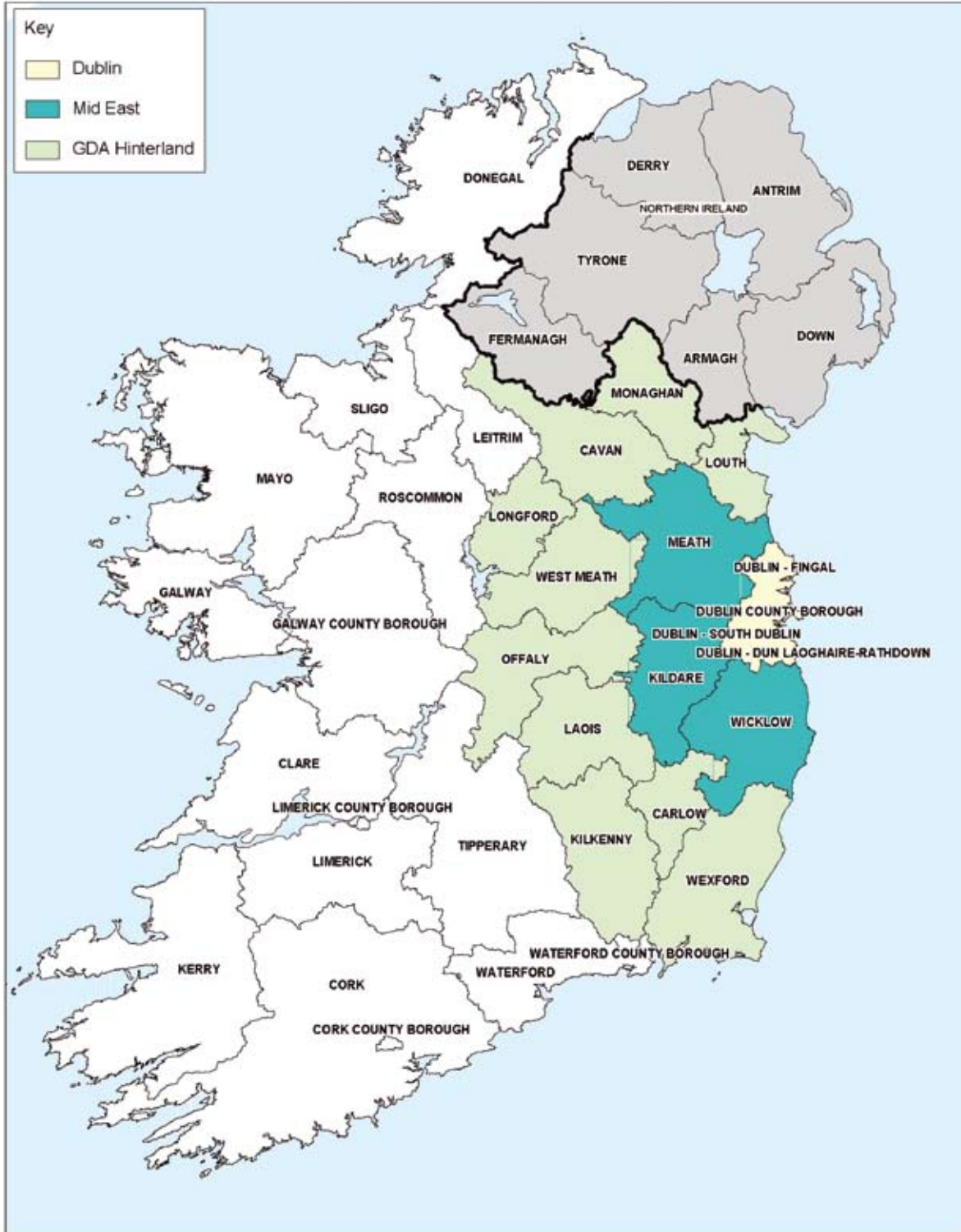


Figure 1.1

Map of Counties and Regions in the GDA



- To review any changes in relevant retail policies since 2001 and their impact on a revised Strategy, including:-
 - *providing a supporting rationale for a retail hierarchy for the GDA,*
 - *strategic guidance for incorporation into Development Plans, and*
- in the light of the review and update, to set out an overall vision for retail for the GDA, which is in keeping with and supporting the settlement strategy adopted by the RPG's and reflects the importance of public transport links, particularly in relation to comparison shopping.

Study Approach

- 1.5 The updating of the 2001 Retail Strategy involved combining new analytical research, with recent market trends and retail planning expertise. Although the study has regard to existing plans and policy documents and recent retail developments, it nevertheless, seeks to adopt a new approach to the formulation of an updated and revised Retail Strategy for the GDA by incorporating experience of current retail planning policy alongside the production of new data on the retail sector.
- 1.6 It is vital that the revised Retail Strategy is based upon quality information and rigorous and transparent research, analysis and forecasts. Therefore, although some data were available prior to the commencement of the study, it was also necessary that a substantial body of new information was acquired in order to satisfactorily meet the study objectives. These new data fell into two broad categories:-
- consumer surveys – three separate surveys were undertaken:-
 - *a telephone survey of 5,000 households living throughout the GDA and its shopping hinterland;*
 - *a street questionnaire survey of 750 young persons aged (16 to 34 years) in Dublin City Centre and Dundrum Town Centre;*
 - *a street questionnaire survey of 500 tourists/visitors within Dublin City Centre.*
 - statistics - the most up to date statistics were used in the study, including:
 - *retail floorspace of existing centres and shops throughout the GDA.¹*
 - *consumer retail expenditure per head for small areas within the GDA and its shopping hinterland and the forecast growth in this expenditure;²*
 - *2006 Census populations by Electoral Division and projections of population based on the RPGs (as updated in April 2007);*
 - *details of retail floorspace recently granted or built within the GDA.³*
- 1.7 Running parallel with the survey work and the technical analysis, a wide range of consultations have been carried out with relevant statutory organisations within the GDA. The list of consultees includes planning and other relevant officers from each of the seven Councils within the GDA and the Dublin Transportation Office (DTO). The co-operation of all organisations and individuals who have assisted in the preparation of this report is gratefully acknowledged. Regard was given to all views expressed and submissions received during all stages in the production of the Strategy, with the result that the Strategy as now presented was informed though not necessarily directed by the many opinions and perspectives given.
- 1.8 Reflecting the study objectives outlined above, it should be borne in mind that this Strategy primarily provides a strategic assessment of retailing throughout the GDA and does not directly address individual sites and/or development proposals.

1 These statistics have been provided by the seven Councils within the GDA

2 Experian Paper (see appendix 5)

3 This information has been provided by the seven Councils within the GDA, Permission data end date is September 2007.

Structure of Report

- 1.9 Following this Introduction, the Report is divided into two sections- the Strategy and the Appendices. Section 1 presents the new retail planning strategy for the GDA including a summary of the results of the retail capacity analysis, whilst Section 2 (the Appendices) provides a more in-depth look at the methodology for quantifying retail need and sets out the results in more detail.
- 1.10 Chapter 2 contains a short review of the previous GDA Retail Strategy. Chapter 3 reviews the changes to the retail sector since the publication of the 2001 Retail strategy and outlines the challenges facing towns and centres in meeting the needs of the sector and supporting towns as important destinations for their catchments. Chapter 4 outlines the policy influences on the update of the retail strategy, whilst Chapter 5 examines the current issues arising from the spending patterns in the GDA and sets out the approach adopted in assessing the quantitative need for additional floorspace Chapter 6 is the retail strategy- setting out the policies and objective recommendations and the retail hierarchy for the Greater Dublin Area.
- 1.11 The appendices which are published on the RPGs website (<http://www.rpg.ie>) and give a more detailed breakdown of the quantitative model used to analyse the market and predict future growth; as well as including copies of survey questionnaires used, an economic analysis report on expenditure and a list of submissions received.

Public Consultation

Public consultation was undertaken at the start (pre-draft) of the review process, with notices placed in national and local papers, leaflets distributed to Council offices, letters sent to various key bodies such as the Chambers of Commerce in the GDA and to all elected representatives. Two public meetings were held, the dates of which were publicly advertised. In all during the pre-draft stage 25 submissions on the Review and Update of the GDA Retail Strategy were received. During the preparation of this Strategy all of the wide ranging views expressed were considered and relevant points have been reflected within the strategy. A list of submissions received and a summary of the issues raised by each submission is included in Appendix 2.

- 1.13 The submissions received at pre-draft stage fell into four distinct groups- statutory bodies, representatives of retail proprietors or developers, representative bodies and others. Those representing developers or retail firms sought changes to the designation of a number of centres or proposed centres; cognisance of smaller and specialised stores; parity of assessment; cognisance of traffic and transport issues and their impact on retail. Statutory consultee submissions highlighted the impact of new retail on the road network, importance of looking at issues at regional level and not county, primacy of the city centre, parking charges and other mechanisms to reduce car use. Retail representative bodies raised concerns relating to the public consultation, importance of certain towns and the need to revitalise and promote such locations; use of Business Improvement schemes; importance of indigenous firms, appropriateness of scale and the need to support town centre developments. Other submissions received emphasised the impact of council boundaries on retail policies and the need for town centres to have a multi-functional role with mixed use schemes promoted to give a sense of place and identity; and that neighbourhood centres should be walkable, accessible and adequate to meet needs of surrounding populations.
- 1.14 The draft Retail Planning Strategy will go through a further period of consultation for six weeks from the 28th April, 2008. At all stages during the process of producing the revised and updated Strategy a regularly updated website page was maintained on the RPGs website- <http://www.rpg.ie>.



(Photo courtesy of Architen Landrell Associates)



PART 2

Review of previous Retail Strategy

Introduction

- 2.1 This Chapter presents a short review of the key data projections which underpinned and shaped the quantitative retail floorspace need assessment of the previous GDA Retail Planning Strategy. It then compares the assumptions used with actual changes that have occurred since 2001 and existing forecasts. This is followed by an overview of the main changes that have occurred across the GDA retail market since the previous retail strategy.

Changes to Key Data Assumptions (Consumer Demand)

- 2.2 The first retail planning strategy for the GDA was prepared by DTZ Pineda Consulting and was published by the Dublin and Mid-East Regional Authorities in November 2001. Since it was published the GDA has experienced considerable changes to its population, economy and retail offer. The 2001 Strategy sought to forecast these trends through to 2011, but due to higher levels of growth experienced in population and economic terms, invariably the projections have not always matched the predictions made. The results of the baseline surveys carried out in 2001 were also out of date as shopper behaviour has changed considerably in response to major new shopping developments such as Dundrum Town Centre; and there was a clear need for updated data and information on shopper behaviour following such new developments.
- 2.3 This report takes into account the significant changes that have occurred within the GDA since 2001 and provides new economic, demographic and retail forecasts through to 2016. These key changes provide an important context to the assessment of existing shopping patterns and the quantification of additional retail floorspace need which have a significant bearing on the revised retail planning strategy.

Population

- 2.4 The 2001 Strategy estimated the population of the GDA at 1.534 million and projected that it would grow to 1.654 million by 2006, reaching 1.764 million at 2011. This compares favourably with, if a little conservatively, to the Census 2006 population of 1.663 million. The GDA's population projections were revised upwards to reflect the higher levels of economic growth and migration experienced and is now forecast to reach 1.967 million by 2016. A comparison of the two sets of projections (summarised in **Table 2.1**, below) indicates the revisions made at Regional level to future population growth. Although the difference at 2006 (9,000 or 0.5%) is only marginal, the shortfall increases to more than 50,000 by 2011 (2.8%) – equivalent to the size of a large town.

Year	2001 Retail Strategy Projection	2008 Retail Strategy Projection	Difference
2001	1.534	-	-
2006	1.654	1.663	0.009
2011	1.764	1.815	0.051
2016	-	1.967	-

- 2.5 The population projections for the GDA show a rise in population of 304,000 between 2006 and 2016, an increase of 18.3% in 10 years. The population projections used by the RPGs and by this study draw from the revised NSS, whose projections show a rise in the State population to 5.055 million by 2016.⁴ The Central Statistics Office (CSO) published a slightly lower population projection in 2005 with a forecasted rise of 15.5% (645,000) to 4.811 million by 2016⁵.

⁴ Circular SP1/07, Department of Environment, Heritage & Local Government

⁵ CSO Regional Population Projections 2006-2021, 25 May, 2005

Economic Growth

2.6 The likelihood of significant economic expansion was built into the model used for the 2001 Strategy. This assumption fed through into the forecasts of growth in consumer retail expenditure per head. In the intervening years, the levels of economic growth experienced have, as forecast, been generally very high. Underpinned by high levels of EU and private foreign investment, a social partnership approach to economic development and a rapidly expanding labour force, GDP grew from €116.8 billion in 2001 to €174.7 billion in 2006, a growth of €58 billion or (50%) in just five years⁶. This made Ireland the fastest growth economy in the EU during this period.



⁶ Source: Eurostat, Verdict Research

Growth in Retail Expenditure

- 2.7 The 2001 Retail Strategy adopted 'high' (H) and 'low' (L) forecasts for real growth in consumer retail expenditure per head from 2001 through to 2011. These were based on ESRI forecasts for the entire country and related to all retail goods. Convenience goods and comparison goods growth rates were then estimated. In **Table 2.2**, below, the 2001 Strategy growth assumptions are compared to the actual rates of increase in spend per head.

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Strategy	2001 Retail Strategy ⁷		2008 Revised Strategy ⁸	
Growth	Annual Growth Rate (%)		Annual Growth Rate (%)	
Goods	Convenience	Comparison	Convenience	Comparison
2001-2006	H 1.80 L 1.30	H 7.50 L 5.00	-0.33	5.45
2006-2011	H 1.36 L 0.95	H 7.50 L 5.00	0.80	4.56

- 2.8 The comparisons indicate that the 2001 Strategy somewhat over-estimated the (actual) rate of real growth in consumer retail spend per head from 2001 through to 2006 - particularly for convenience goods. In preparing the Strategy, this area was re-assessed and new annual growth rate projections prepared, which when compared to those used in the 2001 Strategy are somewhat lower.

Other Technical Assumptions

- 2.9 The scale of any available headroom expenditure in the future is largely determined by population growth and increases in consumer retail expenditure per head. However, there are two additional factors which, in practice, 'soak-up' some of this growth in expenditure - 'special forms of trading' (SFT) (which includes retail expenditure over the internet) and real changes in store productivities or sales densities.
- 2.10 In the preparation of the previous retail strategy it was projected that the levels of activity for such special forms of trading (SFT) as a proportion of comparison goods expenditure would grow to 1.5% by 2006 and 4% by 2011⁹, whilst assuming no SFT for convenience goods. The intervening years have seen rapid expansion of broadband availability and the growth of internet shopping and the advent of more recent research on the subject indicates that it is likely that the proportion of consumer spend accounted for by SFT at the 2001 base year was underestimated and that the rate of growth in the expansion of SFT projected up to 2011 was too conservative. More recent data suggests SFT will reach around 7% of consumer spend on convenience goods shopping by 2016 and double this for comparison goods.
- 2.11 In relation to store productivity it was assumed in the 2001 Strategy that there would be a 1.0% per annum real increase for comparison goods retailing and no real growth for convenience goods¹⁰. More recent research now available demonstrates that these assumptions are likely to have been under-estimated, with figures of between 1.5% and 2% per annum and c. 0.5% per annum for comparison and convenience goods retailing respectively now considered more realistic. (see Chapter 5 for further details).

⁷ Source: Retail Strategy 2001

⁸ Source: Experian 2008 (see detail of analysis in Appendix 5)

⁹ GDA Retail Planning Strategy, November 2001 (Paragraph 3.17).

¹⁰ GDA Retail Planning Strategy, November 2001 (Paragraph 3.11).

Review of Policy in 2001 Strategy

- 2.12 The retail hierarchy set out in the 2001 Strategy was broadly supported in all of the adopted Development Plans and retail strategies and/or policies adopted in each of the seven Council areas. The designation of key locations within the hierarchy gave clarity and focus to the progression of new schemes for a number of such centres and confidence to key towns as to their role and function within their area and catchment. However some locations designated as important retail centres have not been as successful as hoped, with market share diverted to other centres/towns where the quality of retail facilities and range of traders were sufficiently higher for customers to choose to travel further to avail of more choice.
- 2.13 Generally, the recommendations regarding the inclusion in development plans of issues regarding hierarchy, identification of sites for certain uses (such as retail warehousing), primary retail cores, and criteria for assessing applications have been included to a greater or lesser extent in adopted plans. Some other recommendations on actions such as using compulsory purchase powers, issuing development briefs, or the adoption of Town Centre Management have not been as widely used, but served a purpose where employed. The increased quality of local area plans, masterplans and strategy documents in examining fine grain urban areas, highlighting possible key sites and outlining suitable solutions whilst creating opportunities for strong connectivity and improvements to the public sphere, have been particularly successful at bringing solutions to improving the town centres designated in the Strategy and assisting in stimulating good quality development.
- 2.14 The rapid growth in population experienced, alongside higher levels of prosperity have seen towns in the Mid-East become much more vibrant, and a number of high profile, good quality retail facilities have opened in these towns. This has helped make them attractive destinations for comparison shopping for the local catchment population, reducing the scale of car-based travel for regular comparison shopping. Environmental improvements and the improvements to public transport in the City centre have supported the City's role as the primary destination; however, since 2001 there have been no significant new retail development added- though quite a number of major refurbishments have taken place improving the standard of retail within the city core. The major town centres within the metropolitan area have seen a range of changes and their designation has supported, for the likes of Swords, new retail developments in the town.
- 2.15 Growth in some centres since 2001 has been high, whilst others for various reasons have not improved or diversified to keep pace with consumer expectations. For certain town centres, including Bray and Tallaght planned new retail developments which were proposed in 2001 have failed to come on stream during the life of the first retail strategy. For towns where expected development has not taken place, the rebalancing/retention of expenditure flows could not be achieved; with other centres with better but more distant facilities attracting the trade, and encouraging increased distances travelled by car for shopping.

Conclusions in relation to Review

- 2.16 Although the population within the GDA has grown somewhat more rapidly than predicted in 2001, which will have boosted available consumer retail expenditure, in practice, this positive was out-weighed by a lower out turn of real growth in consumer retail expenditure per head, the underestimation of the growth in special forms of trading and store productivities and on the supply side, a failure of certain schemes to come on stream. The retail capacity assessment in the 2001 Strategy may have in some locations presented a somewhat over-optimistic view of retail floorspace need within the GDA through to 2011. The scale of improvements to certain town centres in some areas have exceeded what was predicted and in others have failed to deliver, resulting in the likelihood of increased travel for lower level comparison shopping and for some convenience shopping. In 2001, the expectation of growth in relation to newer areas of retailing was conservative- particularly the scale of market growth for discount retailers and the recent increases in online shopping.
- 2.17 The 2001 Strategy set out a strong hierarchical structure which reflected the Strategic Planning Guidelines (SPGs). The adoption of the 2004 Regional Planning Guidelines re-enforced this hierarchy and has encouraged growth in housing and economic development into these key towns - building up critical mass. The revision of the 2001 Strategy also provides a clear opportunity to build on the work previously undertaken; to revisit shopper patterns, and to take account of the different economic experience and circumstances of the GDA.





PART 3

Policy Influences on the Update
of the Retail Strategy

Introduction

- 3.1 This Chapter describes the main policy documents and positions that have shaped the preparation of the revised GDA retail planning strategy, which is set out in full in Chapter 6. The experience of retail planning policy has undergone a considerable transformation over the past decade- learning from the experience in Europe and particularly the UK. There is now a clear focus within the Irish system on the protection of the vitality and viability of its town centres to stem flows from traditional town centres services to out of centre stand alone locations. The publication of the 1998 Retail Planning Guidelines brought through the importance in large retail developments of demonstrating that - (i) there is a need for the development, (ii) it is sequentially preferable, (iii) it is of the right scale, and (iv) the impact on neighbouring centres will be minimised.

Policy Influences

Retail Planning Guidelines for Local Authorities (2005)

- 3.2 The Retail Planning Guidelines for Local Authorities published in 2000 were reviewed and republished in 2005 with the main change made in the document relating to retail warehouses. These revised guidelines (2005) contained new policies regarding large retail warehouses and took effect in February 2005.
- 3.3 The guidelines provide a comprehensive 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.
- 3.4 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.
- 3.5 The guidelines identify five key objectives, of equal weight, which are as follows:
- 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 or close to existing, new or planned national roads/ motorways.
- 3.6 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.
- 3.7 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.
- 3.8 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.

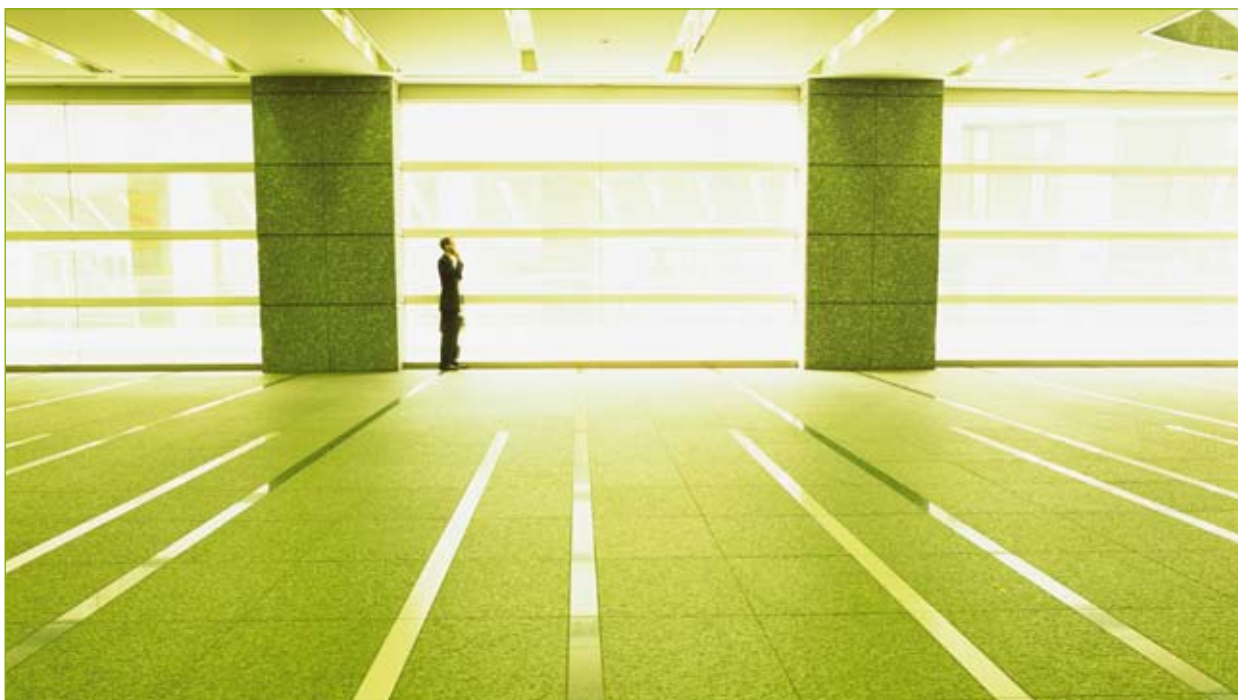


Table 3.1: Summary of Changes in the Assessment of New Specialist Development

TYPE OF DEVELOPMENT	RECOMMENDATIONS
Large Retail Warehouse (para 26)	May be considered for locations close to such road networks where the proposed development would be situated in an Integrated Area Plan area in a Gateway (designed by the National Spatial Strategy) and where the road network has sufficient capacity. Recognises that the scale of such outlets requires a regional, if not a national population catchment.

- 3.9 In addition, to the general policies and objectives, the Guidelines provide provisions for specific types of development.
- 3.10 A summary of the main amendment to the 2000 guidelines - the addition of policies relating to the assessment of large retail warehouses is summarised in **Table 3.1** above.

2002 National Spatial Strategy

- 3.11 The National Spatial Strategy (NSS) was launched by the Government in November 2002 to provide a strategic vision for the spatial development of Ireland for the period 2002-2020, focusing on people, places and communities.
- 3.12 The creation of a National Spatial Strategy was introduced by the National Development Plan 2000-2006 with a view to providing an indication of the spatial development patterns for areas; indicative policies relating to the location of industrial development, residential development, services, rural development, tourism and heritage.

- 3.13 The strategy recognises that there has been a significant growth in economic, social and physical progress which has not been balanced across the regions. Whilst the GDA has significantly contributed to Ireland's recent growth and prosperity, other places and areas within Ireland need to be recognised on a national and international scale. The NSS therefore seeks to ensure that for the period 2002-2020 a more balanced pattern of development emerges, identified as 'balanced regional development'.
- 3.14 The definition of 'balanced regional development', as provided in the NSS, is as follows:
"Developing the full potential of each area to contribute to the optimal performance of the State as a whole - economically, socially and environmentally."
- 3.15 Unbalanced development ultimately affects quality of life, for example long journeys to work, services, leisure facilities etc, and affects the vibrancy and attractiveness of towns and villages for residents and visitors. Appropriate land use policies are therefore required in order to guide the appropriate development to a suitable location. In order to provide successful, vibrant and sustainable cities, towns and villages they need to be physically compact with good access to public transport.
- 3.16 The NSS recognises the rapid population and economic growth of the GDA which has driven the majority of the country's economic success in recent years. This growth, however, had led to a number of development pressures, including housing supply issues and traffic congestion within the city and its surroundings. Due to an increase in the supply of technology campuses, out-of-town retail parks and improvements to the road networks, it has encouraged people to travel to work, shop and for daily activities, therefore Dublin has become a 'dispersed' city.
- 3.17 The NSS states that Dublin will no doubt continue to grow in the future and its continued performance is considered to be fundamental to the Irish economy. The strategy recognises the importance of consolidating Dublin in order to prevent urban sprawl and traffic movements to the surrounding counties. For the GDA hinterland, it advises that new development should be focused in established towns with capacity for growth and on public transport corridors, for example, Navan and Naas.

Regional Planning Guidelines for the Greater Dublin Area

- 3.18 Regional Planning Guidelines for the Greater Dublin Area (RPGs) were adopted in 2004 and replaced the previous non-Statutory¹¹ Strategic Planning Guidelines of 1999. The RPGs set out a robust sustainable planning framework for the Greater Dublin Area with a core function of delivering the National Spatial Strategy (NSS) to County and City level. The RPGs seek to develop the Greater Dublin area as an internationally competing City-Region with all areas located in the GDA collectively contributing to this success. The settlement strategy adopted divided the area into two development policy areas- (i) the metropolitan area and (ii) the hinterland area.
- 3.19 For the metropolitan area the key policy objective is consolidation, with a much enhanced multi-modal transport system. For the City Centre this requires increased densities for residential developments particularly at public transport nodes.
- 3.20 For the hinterland areas development is to be focused primarily into identified towns separated from each other by a strategic green belt; with an increase in overall densities and a high level of employment activity, high order shopping and a full range of social facilities in the key towns. The longer-term objective of these towns is to achieve a strong level of self-sufficiency with limited commuting to the metropolitan area. Both to support economic activity and to accommodate existing and some future commuting these towns should be well linked to Dublin by good road and public transport infrastructure.
- 3.21 The RPGs set out a hierarchy of towns and centres for the region, to focus growth and investment and to create critical mass both for economic growth and community services. This hierarchy showed Dublin City as an NSS Gateway at the highest level; with Large Growth Towns (hinterland) and Metropolitan Consolidation towns

¹¹ The 2000 Planning Act gave retrospective statutory recognition to the Strategic Planning Guidelines from 2001 until they were superseded by the RPGs in 2004.

(metropolitan area) next; followed by large and moderate growth towns at a smaller scale. To achieve viable critical mass certain towns in close proximity where linked services and pooled employment opportunities could be achieved are grouped in “dynamic clusters

- 3.22 The RPGs, as part of delivering the NSS set out as part of the settlement strategy a framework for accommodating the future population of the GDA. This strategy identified the key areas of new population growth and set the requirements for housing land provision each Council to provide as part of their City, Town and County Development Plans. These population projection figures adopted by the RPGs (as updated) are used for estimating population growth in the GDA.

DTO Transportation Strategy – ‘A Platform for Change’ (Final Report 2000)

- 3.23 The Dublin Transportation Office (DTO) was established in 1995 with the prime responsibility of strategic transport planning in the GDA. The strategic vision document - a *‘Platform for Change’* was published in November 2001 to provide a transport strategy to support and complement the strategic land use planning framework as set out in the 1999 Strategic Planning Guidelines. The document set out a long term transportation strategy for the GDA for the period 2001-2016 and seeks to transform the transportation system in the GDA by extensive, high quality, fully accessible, integrated networks for DART/suburban rail, LUAS, METRO, bus, roads, cycling and walking. It anticipated that public transport would cater in the future for a majority of the demand for travel in the GDA, with an increase in passengers using rail based systems and roads to be managed so that congestion for all road users is minimised. The overall effect of delivering the strategy will be to reduce average journey times, polluting emissions and traffic accidents. The Strategy is currently undergoing a period of review with a revised Strategy due to be published in 2010.
- 3.24 The DTO strategy identifies that in order to provide a high quality, efficient and effective transportation system there must be a nexus between improving the transportation system in terms of infrastructure, the quality of service and its accessibility, and managing the growth in demand for travel, especially by private vehicles.
- 3.25 Infrastructure and service improvements identified included a significant expansion of the public transport network including the DART and suburban rail network upgrade and expansion including new stations, signalling upgrades, platform extensions, new trains, new route spurs, and segregation of intercity and suburban services; completion of the LUAS and the development of a METRO network, including an orbital route. Also included was expansion and reform of the Bus network; general improvements to the integration and attractiveness of public transport, improvements to cycling facilities; and encouraging a high quality taxi and hackney service
- 3.26 A number of national road projects were proposed, in accordance with national economic policy objectives. The first project is the upgrading and completion of the orbital motorway around Dublin (M50, the Dublin Port Tunnel and Eastern by-pass) and the second project is the upgrading of the arterial routes outside the orbital motorway, including the M1, M2, M3, M4, M7 and M11.
- 3.27 The second element of the strategy, which was viewed as fundamental to the success of the land-use strategy for the GDA, relates to the management of demand of traffic movement and seeks to achieve the following objectives:
- A reduction in the growth in the need to travel.
 - A shift in modal transfer from the private car to public transport, especially during rush-hours and areas which suffer from congestion.
 - A reduction in the level of congestion on the road network to 1991 levels.

This can be achieved through effective land use policies which promote the location of new development within existing transport corridors and consolidation of new development within the existing metropolitan area and defined centres in the hinterland area. Moreover new development will recognise the importance of walking and cycling as a key mode of transport and land use patterns should be proposed, which support and promote these options.

Transport 21 and the National Development Plan

- 3.28 Transport 21 was launched in 2006 and provides a capital investment framework through which the transport system in Ireland will be developed over the period 2006 to 2015. The National Development Plan (2007) sets out the investment programme for the next seven years divided into five priority areas- economic infrastructure; enterprise, science and innovation; human capital; social infrastructure and the fifth being social inclusion. In both of these key documents the Government committed itself to a high level of capital investment of €34 billion to develop a modern transportation system and to address the key issues of past investment backlog and the continued growth in the demand for transportation. The investments seek to increase accessibility to public transport; ensure sustainability; increase capacity and levels of use of public transport and enhance quality. The elements of the investment programme directly relevant to this study and are shown below in **Table 3.2**.
- 3.29 Transport 21 and the NDP recognise that an integrated, effective and appealing public transport system is essential in order to provide a real alternative to the private car and to thus encourage a modal shift meet sustainability targets.

Table 3.2: Elements of Greater Dublin Area Investment Programme related to the Retail Strategy

1.	Development of Metro North from St Stephen's Green to Swords via Ballymun and Dublin Airport.
2.	The construction of Metro West, connecting Tallaght, Clondalkin, Lucan, Blanchardstown and Ballymun, connecting to the Tallaght Luas line in the southwest and the Metro North at Ballymun to the north of Dublin city.
3.	The construction of the suburban rail interconnector providing a tunnelled link between Heuston Station and the Docklands, via St Stephens Green and linking with the Northern line.
4.	Development of the heavy rail line from Clonsilla to Pace (Phase 1) and on to Navan (Phase 2) to create a high quality commuter service.
5.	Completion of the Kildare Route Project to Hazelhatch.
6.	The extension of the LUAS network to the Docklands, Citywest, Bray and construct a new line from St Stephen's Green to Liffey Junction and constructing a new line from Lucan to the City Centre.
7.	Development of the bus network to create a meshed network of services and reorient it to take account of the proposed rail developments described above.
8.	Completion of the motorway network extending from the M50; including the M3 to Cavan, the N11 in Wicklow and upgrading the N4 in South Dublin and Kildare.
9.	Completion of the upgrade of the M50 route and interchanges
10.	Creation of a network of public transport interchanges to allow easy transfer between the different forms (Luas/Bus/Rail/Metro).
11.	Introduction of a 'Smartcard Integrated Ticket' which will allow one ticket to be used across the entire public transport system.
12.	The provision of park and ride facilities at appropriate locations.
13.	The implementation of a phased programme of demand management measures.
14.	The introduction of an integrated public transport information system.

Statutory Development Plans

- 3.30 Retail development is primarily regulated through the Development Management process and the acceptance of retail development at a particular location depends on the policy and zoning provision within the different City, Town and County development plans which make up the GDA.
- 3.31 Under Part II, Chapter 1 of the Local Government (Planning and Development) Act 2000, planning authorities have a statutory duty to produce a Development Plan for their functional area every six years. The purpose of a Development Plan is to provide a strategic framework for sustainable development to ensure growth takes place in a co-ordinated and integrated manner, whilst protecting, preserving and enhancing the intrinsic character, heritage and amenity of an area and making a positive contribution to an improvement in the quality of life.
- 3.32 A Development Plan must include the zoning of land for the use of particular areas for specific uses within the respective settlement boundary. New retail development is mainly regulated through the development management process and the determination of whether a proposed retail development is acceptable is highly dependant upon the relevant policies and the zoning of the respective development plan. Therefore the zoning strategy within the Development Plans is a key factor to retail planning strategy.
- 3.33 A summary of various Development Plan zonings is provided in **Table 3.3** below.

Table 3.3: Zoning Policies in each Council relating to Retail

Plan	Zone/zoning objective
Dublin City Development Plan 2006-2011	<p>Z3- To provide for and improve neighbourhood facilities.</p> <p>Z4- To provide for and improve mixed service facilities.</p> <p>Z5- To consolidate and facilitate the development of the central area and to identify, reinforce and strengthen and protect its civic design, character and dignity.</p> <p>Z10- To consolidate and facilitate the development of inner suburban sites for mixed use development of which office, retail and residential would be predominant uses.</p>
Fingal Development Plan 2005-2011	<p>MC- Major Town Centre: To protect, provide for and/or improve major town centre facilities.</p> <p>SC- Suburban Centre: To protect and enhance the special physical and social character of major suburban centres and provide and/or improve urban facilities.</p> <p>NC- Neighbourhood Centre: To provide, provide for and/or improve neighbourhood centre facilities.</p>
Dun Laoghaire – Rathdown County Development Plan 2004-2010	<p>MT- To protect, provide for and/or improve major town centre facilities.</p> <p>DC- To protect, provide for and/or improve district centre facilities.</p> <p>NC- Neighbourhood Centre: To provide, provide for and/or improve neighbourhood centre facilities.</p>

Table 3.3: Zoning Policies in each Council relating to Retail

Plan	Zone/zoning objective
<p>South Dublin County Development Plan 2004-2010</p>	<p>TC- To protect, provide for and/or improve Town Centre facilities.</p> <p>DC- To protect, provide for and/or improve District Centre facilities.</p> <p>NC- Neighbourhood Centre: To provide, provide for and/or improve neighbourhood centre facilities.</p>
<p>Kildare County Development Plan 2005-2011</p>	<p>A- Town Centre/Core Retail – To protect and enhance the special physical and social character of the existing town centre and to provide for new and improved town centre facilities and uses.</p> <p>G- Village Urban Centre- To provide for retailing, community and social facilities.</p> <p>N- Neighbourhood Centre. To provide for a new neighbourhood centre and associated facilities.</p>
<p>Meath County Development Plan 2007-2013</p>	<p>B1- To protect and enhance the special physical and social character of existing town and village centres and to provide for new and improved town centre facilities and uses.</p> <p>B2- To provide for major new town centre activities in accordance with approved action are plans and subject to the provision of necessary physical infrastructure.</p> <p>B3- To protect, provide for and improve local and neighbourhood shopping facilities.</p>

Table 3.3: Zoning Policies in each Council relating to Retail

Plan	Zone/zoning objective
<p>Wicklow County Development Plan 2004-2010</p>	<p>B1- Bray Town Centre - To provide for the development and improvement of appropriate town centre uses including retail, commercial, office and civic use, and to provide for 'Living over the Shop' residential accommodation.</p> <p>Wicklow Town Centre – To provide for commercial, retail and community services as the primary uses. There will be a presumption in favour of higher order retail rather than convenience retail. Residential uses are open for consideration where they complement the primary function of the Town Centre. The role of the Town Centre as the service centre of the town and environs will be supported.</p> <p>TC-Town Centre-To provide for the development and improvement of appropriate town centre uses, including retail, commercial, employment and civic uses.</p> <p>V- Villages - To protect and improve existing village character and to provide for appropriate residential, retail and commercial development.</p>

Conclusions

3.38 The Greater Dublin Area is a complex and varied landscape of economic activity, transport challenges, growing and mobile populations and high levels of activity in retail, leisure and community activities as part of the life experienced by those who live, work or visit the GDA. From an examination of the many key statutory and non statutory documents which impact on the Retail strategy two key themes emerge which play a vital role in framing the revised Retail Strategy; these being:

Sustainability:

- *through providing locally accessible shopping for the more regular needs of communities, in ways that the options of walking and cycling as mode of getting to a destination are promoted;*
- *by providing higher order shopping at key locations of core activity (that is, where people work and socialise), and which are easily accessible by high quality public transport particularly rail based links so that the catchment for such areas by public transport is maximised.*

Choice:

- *providing adequate retail permissions and development opportunities over the life of the Strategy to ensure that good market choice and competition is available;*
- *ensuring that retail is located where all members of society actively make choices about their destinations for shopping;*
- *to protect key centres from the danger of obsolescence by not facilitating significant over-supply in the market that would result in areas losing key retail services.*





PART 4

Retail Market Review

Introduction

- 4.1 This section examines the current state of the retail market in the GDA. Following a description of the economic setting of the retail market, this chapter examines changes to the various types of retail centres since the adoption of the 2001 Strategy; and it also identifies new trends in retailing which impact on the approach adopted in the revised Strategy and examines the recent levels of activity in retail permissions within the GDA.

Economic Growth

- 4.2 Since the adoption of the first Retail Strategy for the Greater Dublin Area in 2001 the levels of economic growth experienced have been significant. As stated in paragraph 2.6 this growth has been underpinned by high levels of EU and private foreign investment, a social partnership approach to economic development and a rapidly expanding labour force. Moreover, GVA (Gross Value Added) which is the value of goods and services at basic prices, excluding product taxes but including product subsidies¹² increased steadily across the GDA between 2000 and 2005 from an output of €43,622 million to €68,638 million. The combined Dublin and Mid East GVA was 23.1% higher than the national average in 2005.¹³
- 4.3 However, a number of economic commentators now predict the growth in Irish GDP will slow going forward¹⁴, with a possible recovery in 2009. The housing market, which appears to be reducing to more sustainable levels, is likely to experience a significant drop in 2008-2009 production from 2006 levels. The impact on the next few years of changing global and local economic circumstances would suggest that the economic growth experienced in recent years is unlikely to continue its recent buoyant trend. This expected slowdown in economic expansion is reflected in forecasts of growth in consumer retail expenditure per head used in this Strategy through to 2016.
- 4.4 The impact of these lower levels of forecasted growth in demand, for the GDA, is that if completely unrestricted retail development is permitted, the effects on existing towns and centres will be detrimental. For this reason, the Retail Planning Strategy review sets out key retail tests which should be adhered to in all large retail applications especially those which are sited outside of the main retail centres listed in Levels 1 & 2 of the hierarchy (see Chapter 6). These key tests are not intended to, nor do they seek to, bar retail development out of town, but will allow the local authority to give more direction and fully assess where development should occur.
- 4.5 The planning system and the commercial realities of development have to interact but in some instances they may have conflicting interests. To this effect, their interests are mutually inclusive and establishing an appropriate balance is one of the most difficult aspects of retail planning for local authorities.

Retail Market Developments

Growth in Demand

- 4.6 The principal influences on the growth in the GDA retail market have been the high performance economy (helped by the inception of the Euro zone), low interest rates, reduced personal taxation, higher disposable income and changes in household composition and lifestyle incorporating increasing levels of consumption of non-essential goods. In addition, these changes in lifestyle/conspicuous consumption occurred as the State, particularly the GDA experienced net migration.
- 4.7 There has been an unprecedented surge in retail spend since the early 1990's. It was anticipated by commentators in 2001 that by 2003 the levels of spend and the market increases would flatten out. However this did not occur, although there are now definite indications in 2008 pointing to slowing levels of growth in consumer retail expenditure.¹⁵

¹² As GVA includes profits of multinationals it is affected by the reported profits of those companies on a yearly basis.

¹³ CSO Regional Accounts 2008

¹⁴ Central Bank Quarter 2 2008 Quarterly Economic Bulletin, April 2008 & ESRI Spring 2008 Economic Commentary, March 2008.

¹⁵ Internal information from Colliers Jackson Stops & Consumer Sentiment Index (CSI)

March 2008, April 2008 and May 2008 respectively, ESRI & IIB Bank.



Retail Sector Growth

- 4.8 Recent commentary on the Irish retail market is of the view that trading is still strong, if slowing somewhat.¹⁶ It is now expected by some elements of the retail sector that the levels of increase experienced recently in retail rents will not keep rising at the same rates, as the retailers will not be able to improve their turnovers sufficiently to cover the increased rents.¹⁷ It could now be argued that that supply (and more importantly the supply of quality units) is rapidly catching up with demand.
- 4.9 A significant amount of new centres opened during 2005-2006. Major centres opened at Dundrum, Mahon, Quayside-Sligo, Scotch Hall, Marshes-Dundalk, Blanchardstown Centre Extensions (Mall & Park), Navan, Fairgreen-Carlow, Whitewater and Crescent Extension-Limerick all opened for business, as well as Banbridge and Victoria Square, Belfast in Northern Ireland. Moreover, in 2007, new shopping facilities in Athlone, Kilkenny, Sligo, Arklow and Drogheda also came online. The total net sales space of these new retail developments alone amounts to approximately 230,000 sq.m. Most of these centres are highly competitive, well tenanted, high quality shopping environments. If they were to achieve their expected level of market penetration, it could take a significant amount from the total market. For example, if these combined centres were to achieve a collective turnover of €2.5bn (230,000 x €11,000 per sq.m.) it would represent 10% of then total market spend in Ireland. (approx. €24.75bn).¹⁸ Larger developments in Ireland amount to approximately 395,000 sq m gross of additional retail space in the State without considering smaller scale developments.¹⁹ The required level of market penetration of all these new developments is unlikely to be achievable. Added to the increased supply of shops, there is evidence that a number of highly competitive new retailers are actively seeking to enter the Irish market.²⁰ Close cognisance should be taken of these supply side factors coupled with slowing demand in the retail market.

¹⁶ Jones Lang LaSalle January 2008 Retail Report, CB Richard Ellis Quarterly Reviews Q1 2008

¹⁷ Irish Times, 16th of April 2008 & Lisney Research Rental Indices, May 2007

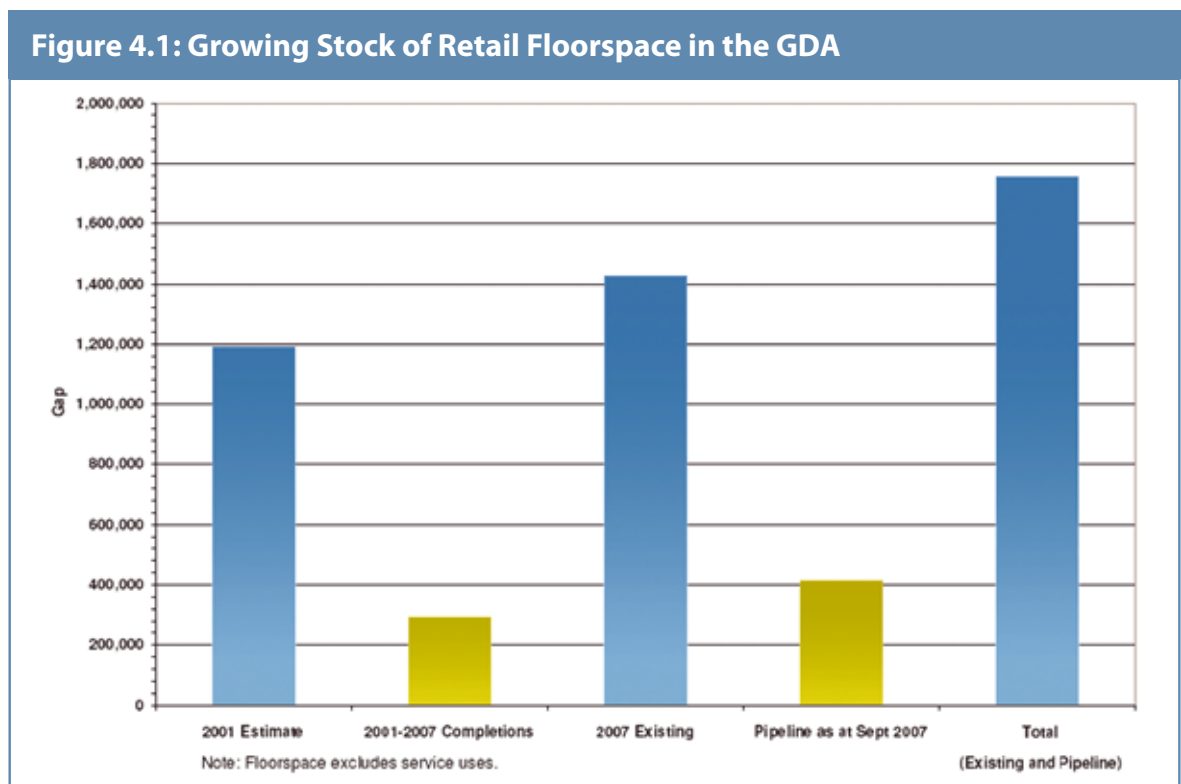
¹⁸ Colliers Jackson Stops

¹⁹ Irish Times, 16th of April 2008- Jones Lang LaSalle Research.

²⁰ Colliers Jackson Stops internal research.

The Retail Development Pipeline

- 4.10 The full retail development pipeline (assuming 100% completion) would represent a 23% addition to the current stock. In terms of retail floorspace, it is estimated that the GDA currently has a stock of 1,418,000 sq.m net, with a further upper limit of 330,000 sq.m of potential retail grants, excluding service use floorspace, as at September 2007. For convenience goods, the GDA retail development total of live unbuilt grants equates to 17% of existing total stock whilst for comparison goods the corresponding figure is 26%. To set this in context, the scale of the GDA retail development pipeline equates to:-
- 79% of the existing retail floorspace stock of Dublin City Centre;
 - almost double the existing retail floorspace stock of Fingal, South Dublin or DLR counties;
 - 12 Dundrum Town Centres.
- 4.11 Of this volume of permissions granted, it is difficult to estimate the proportion of these schemes that will proceed to construction particularly in an uncertain economic climate. This difficulty in presuming that all schemes will be developed is highlighted by presumptions made in the 2001 strategy which did not take place- two large town developments which were planned in 2001 and expected to be built and open have not progressed- Tallaght extension and Bray town centre. Many schemes, particularly larger ones, are the subject of a number of revising applications which can change the scale and extent numerous times before they reach completion. For these reasons the volume of permissions which remain unbuilt has not been deducted from the retail floorspace need calculations for each Council area. However, cognisance of the built permissions over time will be taken by each Council.
- 4.12 **Figure 4.1** overleaf shows how the retail floorspace stock of the GDA has increased since the last Retail Strategy was prepared (2001) and depicts how the pipeline will further add to the quantum of shopping available. Although the population of the GDA has grown since 2001 and is forecast to increase by another 121,600 by 2011, the pace of new retail development (recent past, present and pipeline) has perpetuated, and will continue to result in a growing total of retail floorspace provision per person.



- 4.13 Overall, the trend evident since 2001 has been for the Mid East to account for a steadily rising share of the GDA's retail floorspace stock and this is set to continue through to 2011. Accordingly, Dublin Region's share of total GDA retail floorspace has continued to fall.

Dublin City Centre

- 4.14 The two principal shopping streets in Dublin are Grafton Street, on the south side of the River Liffey, and Henry Street on the north side of the river. They are linked by secondary, more specialised retail streets. Historically, Grafton Street has been regarded as the more up market/high fashion location and Henry Street as the more main stream fashion location. Generally footfall levels in each street have been historically similar.

Review of Recent Changes

- 4.15 The introduction of the LUAS Light Railway (serving both streets) and the opening of Dundrum Town Centre have brought change to shopper behaviour in Dublin City. In addition, the retail offer in Henry Street has been significantly improved, with the arrival of Zara, H&M and the transformation of the former Roches Stores department store (now Debenhams).
- 4.16 Rents in Grafton Street traditionally have been well ahead (up to 40%) of Henry Street rents, although this gap has reduced over the past few years. Sales densities are also higher in Grafton Street. However, the greater stock of shops and the larger average size of shop would account for the lower sales densities in the Henry Street area.
- 4.17 Premiums paid for small shops in Henry Street and Grafton Street have fallen off over the last three years. On the other hand premiums paid for large shops have risen.
- 4.18 Demand for small shops in the Grafton Street area (average ground floor c.80-90 sq m) has been reducing in recent years, whilst the demand for larger retail spaces has grown. This area currently has a low number of shops with a footprint larger than 400 sq m; however a number of proposed schemes in the immediate area would assist in resolving this situation. Sourcing larger spaces in Henry Street has been somewhat easier and there are currently two major redevelopments proposed which also will provide larger more attractive units – the proposed Arnotts and ILAC/Carlton schemes – which will meet the demands of modern retailers in terms of store size.
- 4.19 There are presently a number of retailers seeking larger retail spaces in the Grafton Street area, This pressure has led Zara, H&M and Warehouse to secure large units off Grafton Street at South King Street, which could signal or stimulate a trend for conversion to retail uses of buildings and entire areas adjacent to Grafton Street reflecting the change in retailers' needs. The Grafton Arcade is to be redeveloped as a single retail store which it is understood will be occupied by Tommy Hilfiger, the American fashion chain.
- 4.20 Dublin City also has a number of specialist shopping areas located away from the core retail areas where certain types of trading have grouped - such as the antique traders in the Thomas Street/Francis St. area, furniture shops at Capel St. and designer clothing around Powerscourt Townhouse, as examples. Other speciality shops dotted around the city area create a level of diversity within the retail offer and accommodate customers who travel specifically to purchase from a small pool of shops in the city- for musical instruments or special interest bookshops, for example. Speciality shopping areas create a strong sense of character and place, attracting individuals in speciality goods from a very wide catchment and bolstering the tourism sector. One caveat is that certain elements of this sector are susceptible to moving away from maintaining city centre retail units as rents rise and traders divert towards supplying more of their customers via internet shopping. Though this is an understandable pattern of retail redirection, every effort should be made to ensure that this diverse sector is encouraged to retain street presence as they add vitality to the overall retail mix.

Key Issues

- 4.21 The retail offer in Grafton Street and Henry Street is best positioned to provide the most suitable destination for higher order comparison shopping in Dublin, with niche high end retail in adjoining districts. There are potential threats from the increasingly competitive 'regional' centres, which are becoming very accessible now by public transport as well as by car, with critical mass, quality retailing environments and, most importantly, strong tenant mixes. The lack of large modern units in Grafton Street in particular means there is a danger that the leading retailers, whose requirements cannot be satisfied, might choose to locate in the 'regional' centres, such as Dundrum, The Square-Tallaght, Liffey Valley, Blanchardstown and Pavilions-Swords, away from the City Centre.

- 4.22 The planning framework needs to be more flexible to allow for the expansion or creation of bigger spaces to accommodate this demand. Again, it is of course critical to preserve the character of the prime shopping streets, for example, in terms of retaining the visual effect of elegant Victorian shop fronts cascading down Grafton Street towards Trinity College. However, behind those facades, there may be opportunities for flexibility (subject to building regulation constraints) to allow the creation of more publicly desirable, modern store spaces. This applies to the streets radiating off Grafton and Henry Streets also.
- 4.23 The speciality shopping clustered in certain parts of the inner City is under threat due to increasing land values and redevelopment which can erode the character and attractiveness of such locations, reduce the retail concentration which attracts shoppers to these areas and make the retention of a retail shop in such areas unaffordable. These are issues that will need to be addressed as part of the City Retail Strategy. A positive indicator in the city area has been the development of new small retail areas which have sought to develop new specialist quarters - Cow's Lane in Temple Bar west is a prime example. On the other hand an increase in the general supply of suitable retail space in the city centre may help to hold the rents back in these specialist locations.

Major Town & County Centres

Regional Centres (Metropolitan Area)

- 4.24 Spurred by increases in the population of the GDA and substantial growth in retail spend from the mid 1990's to 2008, a number of strategic regional centres have been developed (in chronological order) at The Square Tallaght, Blanchardstown Town Centre, Liffey Valley, Pavilions-Swords and Dundrum Town Centre.
- 4.25 Dundrum Town Centre opened in March 2005 and is the only major centre to have been completed since the previous retail strategy. Its retail offer includes many stores not previously seen in Dublin, whilst the centre benefits from an excellent strategic location five miles south of Grafton Street, which is served by the M50 and the LUAS light rail system. Retailers at Dundrum report strong business improving year-on-year. Dundrum Phase II was granted permission in 2002 and plans since then have revised the form and size of the original permission. The link between Phase I and future Phase II, known as Fashion Avenue, has been completed and partially let to retailers such as Harvey Nichols, LK Bennett, and Urban Outfitters.
- 4.26 Blanchardstown Centre has been extended both in the central shopping malls and in the peripheral retail parks. It also has a strong retail offer and attracts a significant market share (see maps in Chapter 5).
- 4.27 Liffey Valley trades similarly well, but is in danger of becoming less competitive because of its smaller size and more limited retail offer. In the 2001 Strategy it was recommended that future retail growth in the South Dublin Council area should generally be directed into Liffey Valley. Whilst there was expansion of retail warehousing in the Liffey Valley area, no expansion of non-bulky comparison shopping or of convenience shopping took place.
- 4.28 Swords Pavilions and The Square, Tallaght are currently somewhat less competitive because of their smaller size and tenant mix. While they have similarly strong core markets to the other regional centres, the penetration they can achieve outside the core market is lower than Dundrum, Blanchardstown and Liffey Valley. (See maps in Chapter 5.) There are plans for a third phase of the Pavilion adjoining the Main Street, which will strengthen its role as a major town centre into the future. The Square Shopping centre in Tallaght, now 15 years old, has seen its market share decline whilst losing competitiveness as new destinations open or have been upgraded. For Tallaght to retain its function as a major town centre it is essential that the quality of retail offer (the tenant mix and the retail environment) is upgraded to meet modern market demands and that the opportunities to tie the Square back into the town of Tallaght to create a lively active urban core are taken.
- 4.29 Bray town was historically an important regional centre for retail shopping in the latter half of the 20th century. However, the retail offer in the town has gone into decline, and is now tired, with its poor tenant mix, traffic congestion and access problems making the town uncompetitive in retail terms. For Bray to become a functioning major town centre as envisioned in this Strategy there is a strong and definite need for significant expansion and redevelopment to give it critical mass in order to make the town an attractive, alternative and sustainable retail destination. A proposal for new retail shopping within Bray has been in development for over 10 years; and it is hoped that the infrastructure works which currently constrain the opportunity for this areas retail development will soon be resolved. This will allow new development to give the town a much needed and

expanded modern retail environment capable of reversing the very high levels of outflow of spend from the town, with the creation of increased inflows.

County Towns (Hinterland Area)

- 4.30 Levels of retail growth were slower in the earlier years of the Strategy with regard to the delivery of new retail into the county and regional towns across the hinterland of the GDA. The complex nature of site assembly, transport issues, and opportunity amongst other issues have slowed the lead in time for new schemes which regenerate the retail element of such towns. There have been a number of successes in recent years, with the opening of new retail schemes in Arklow and Newbridge. These have brought high quality retail facilities to these growth towns.
- 4.31 The scale of retail offered in the county town of Navan has improved, but until the traffic congestion within the town is resolved by the completion of the M3 motorway, improving the attractiveness of the town as a destination will be a considerable challenge. Further retail and town centre improvements alongside reductions in through traffic are necessary to allow Navan serve its natural hinterland. In addition these improvements will provide high quality retail within easy reach of the surrounding rural areas and small towns in conjunction with meeting the needs of a rapidly growing population.
- 4.32 Wicklow is an attractive sea-side town, with a charming main street, terminating on the southern end and a recently refurbished town square. While there is a high number of retail units located in the town, the size and form of many of these units will not meet the needs of major retailers- which need to be facilitated within the town to make it a more attractive comparison retail destination. The retail strategy and local area/town centre plans for Wicklow will need to address the issue of identifying suitable locations for new retail as an overarching objective to allow town centre expansion and provide opportunities to diversify the retail offer.
- 4.33 Naas town has in some ways become the lesser relation of its sister town Newbridge with regard to retail offer following the opening of Whitewater shopping centre. However, the current developments under construction which link into the heart of the town will provide a much stronger retail offer and meet the general comparison shopping needs of the town's resident and future population. Naas, as the County town with the Council, General Hospital and numerous higher order services, as well as key industries, has a high degree of local employment and could in the future support further expansion of the retail core.

Key Issues

- 4.34 In terms of comparison shopping, the market must continue to be competitive. In a number of cases large modern units are required to ensure that regional and county town centres remain attractive to retailers. Opportunities for improving the existing environments should be considered, for example at Dún Laoghaire and Tallaght where modernisation is required to counteract a decline in competitiveness due to age, retail mix or unsuitability. Opportunities created by new transport systems or connections- Metro, heavy rail and Luas -could provide the impetus to revitalise a number of regional centres and county towns.
- 4.35 A number of towns across the GDA both in the metropolitan area such as Dún Laoghaire and Bray and the hinterland such as Navan and Wicklow have traditional high streets which are no longer strongly competitive and do not attract top line retailers because of the poor retail environment, uncompetitive tenant mix and principally inadequate space. There is a need for maintaining a strong focus on creating opportunities to make these more attractive destinations for shoppers and for new retail offer to be facilitated and strong policies are needed to direct new and improved floorspace to these towns.
- 4.36 In general, the 'new' Dublin 'Regional' Centres are competitive and increasingly accessible through public transport. It is likely that they have somewhat eroded the city centre's market share over the past decade. To a much lesser extent, newer competing centres in provincial town locations such as Newbridge, Athlone, Drogheda and Arklow could do the same. However, the city centre's sales are expected to continue to improve – as the overall size of the market has grown – even though its market share has declined.
- 4.37 Across the GDA qualitative improvements through redevelopment and centre extension in regional centres, complemented by the enhancement of the city core will create a more robust, diverse and sustainable retail matrix.

District Centres

- 4.38 Many of the older inner-suburban centres, which would have previously had reasonable market share (in a smaller market), now no longer have competitive tenant mixes, suitable shop sizes and attractive shopping environments. These centres need to be revitalised, extended and in some instances, re-invented.
- 4.39 Centres such as the Blackrock, Stillorgan, Nutgrove and Ballymun areas have shopping redevelopment potential, which is desirable in terms of being a reinvention and enhancement of existing stock, to bring it in line with modern retailing needs.
- 4.40 For smaller towns across the hinterland area, fortunes have been varied. Losses of certain middle to higher order services such as banking can have major impacts in reducing the attractiveness of towns serving local catchment areas. A number of towns serving their urban and adjacent rural populations have stagnated becoming less attractive as local shopping centres. Longer distance commuting has seen some trade diverted to place of work rather than maintained locally. For such towns the key issues are in relation to need and scale and their level of proximity to larger Level 2 centres which can meet a large range of demand. Opportunities to provide new retail environments and attract new trade alongside improvements to townscapes and parking should be explored and promoted in county or town retail strategies. A balance in the scale of new retail is required so that it is in keeping with the role of the town.

Convenience Shopping

- 4.41 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 ongoing improvements in public transport and the type of transport available will play an increasing part in shopping trips, as levels of service and linkages between areas are improved. The reality is, however, that most shoppers, especially families, do not have the luxury of daily shopping (as in other parts of Europe) 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. This decline between rural and urban forms reflects on the ground realities whilst also respecting the contemporary consensus of continual development and the promotion of sustainable transport alternatives.
- 4.42 There are a number of improvements required in the older suburbs where the convenience shopping is dated and the populations of these areas are driving unnecessary distances to more attractive shopping centres for their daily shopping needs. This will need to be considered further when the city and county councils conduct their individual retail strategies.
- 4.43 In some of these locations, new centres have been introduced, quite often on the fringe of the territory and not 'supported' by an existing or traditional town/village centre. Further proposals of this nature should be subject to sequential tests (see chapter 6 for detail on sequential tests); and generally discouraged where good opportunities for redevelopment on existing or adjoining lands to the town centre will provide a more sustainable development direction.

Supermarket Provision

- 4.44 The recent trends regarding supermarket development have been towards providing larger stores with a much greater range of products including, in some cases, extension into some comparison shopping, such as clothing and electrical goods; all of which create a wider catchment area for the store. A common feature of inner suburban centres and suburban high streets is that the existing supermarkets are too small to offer the full range of supermarket goods at low prices. The often noted result is that a significant proportion of the catchment population for a local store are regularly shopping some distance away.

Other Forms of Shopping

Retail Parks (Bulky Goods)

- 4.45 There has been a significant increase in retail (warehousing) park schemes since the adoption of the 2001 Retail Strategy. The leading Parks have tended to be the most accessible and include Airside-Swords, Blanchardstown Centre, Liffey Valley, Belgard Tallaght and Carrickmines. These parks have attracted top range 'bulky' goods retailers. All of the larger provincial towns in the GDA now also have competitive retail parks.
- 4.46 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.
- 4.47 The primary focus of future retail parks is accessibility by a range of transportation modes to reduce reliance on the private car and to ensure the range of uses do not cause significant impact on the viability of existing shopping centres.

Factory Outlet Centres

- 4.48 This is a relatively new phenomenon in Ireland. Factory outlet centres or "designer villages" are shopping centres that originally set out to sell fashion over-runs and speciality goods, though in more recent times this has been less of a core function. It is a formula that has been successful on the continent and in the UK but works on a regional or even national basis, with a very large catchment area and population required for the centre to be viable. This type of retailing tends to draw customers from a wide geographical area, predominantly by car. The first centre constructed in Ireland was at Rathdowney, County Laois. This has not been a major success to date, being neither accessible nor close enough to the most dynamic market, the GDA. A second centre proposed at Ballymascanlon, Dundalk was abandoned due to lack of interest from retailers. Another centre was developed and opened at Kildare Village with a number of strong plus factors – a strong tenant line up, a more accessible location and pleasant shopping environment. Whilst not located in the GDA nor the State, the outlet designer village at Banbridge, Co. Down is located approximately a 90 minute drive from Dublin and has the northern half of the GDA as a potential market. This poses a potential, but not hugely significant threat to shopping in the GDA. It is the expectation in the commercial sector is that it is unlikely another centre will open in the near future until demand builds up and the format has been fully accepted by the shopping public. The location of any such centre should be in compliance with the proper planning and development of the area.

Petrol Stations

- 4.49 Petrol stations have been continually evolving as a retail option over the past number of decades; from when petrol was sold as an extra service by local shops and hardware stores to now where petrol station shops include deli counters and sell a range of convenience goods including hot food and wine. Also emerging is the trend of large supermarkets opening petrol stations on part of their sites. The current Department of the Environment, Heritage and Local Government guidelines on retail state that "such shops should, in general, remain secondary to the use of a petrol filling station" and recommends a maximum size of 100 sq.m. of net retail sales area.²¹
- 4.50 Petrol station shops provide an essential local retail service as in many locations they may be the only shop or in some instances the only shop opening outside of regular hours. In addressing the changing nature of petrol station shops it is important to take into account both the primary role of the shop as fuel sales, the traffic implications of expansion of retail; the impact of any expansion on other shops and the need locally for such expansion; as well as the impact on adjoining properties and the local environment in general.

²¹ Section 96 & 97 of Retail Planning- Guidelines for Planning Authorities, DoEHLG, Jan 2005.

- 4.51 The introduction of long length motorways and high quality dual carriageways into the network of national roads has necessitated the provision of facilities to cater for road users who wish to rest, refuel and refresh during their journeys. The provision of such service facilities which include petrol stations, cafes, newsagents/small convenience shops and rest areas are important for the safety of road users and require a different planning approach. Provision of service facilities should only serve motorway users and retail units included on the site should only provide for retail sales of goods at basic convenience and snacks/food to cater for immediate needs.



Conclusion

- 4.52 The period since the adoption of the 2001 Strategy has been an era of significant growth and expansion of the retail sector; with new retailers arriving on the GDA market including Zara, H&M, Coast, Karen Millen, New Look, Debenhams, TK Maxx, and House of Fraser. These new entrants have added to a competitive retail environment. The opening of a number of high profile new centres and refurbishments/extensions, as well as the outlet centre in Kildare will have impacted on shopper patterns. Some other centres which were major players in the retail sector in 2001 have now declined somewhat and need to improve the quality of their retail offer to maintain their market share and competitiveness and to ensure that good quality retail is provided in locations that are local, accessible by foot and/or can be served by public transport. This issue of quality provision and the impact of new forms of retail trading create new challenges addressed in the Strategy.
- 4.53 The growth of future retail is an issue of balance and ensuring that access and sustainability remain key components to the overall strategy of delivery and scale. If significant retail overprovision occurs in the GDA the impacts are likely to involve:
- the secondary streets in the Grafton Street and Henry Street precincts becoming more vulnerable,
 - increased vulnerability and/or deterioration for weaker centres and towns, such as Dún Laoghaire, Bray, Tallaght, Blackrock, Stillorgan, Crumlin/Drimnagh, Finglas, Ballymun and other shopping precincts in the Dublin Area, particularly the older suburban areas and similar threats to Kells, Monasterevin, Athy, or Wicklow and some smaller district shopping centres in the Mid East,
 - all retailers and particularly independent retailers and store groups with lower margins coming under increasing pressure, and
 - a general imbalance of retail provision and the loss of retail spatial robustness.

- 4.54 Significant overprovision would also result in the slackening and in some cases stalling of rental increases; or indeed a fall in rents, reverse premiums (except large store spaces in the Prime City Centre streets, because of scarcity and demand); and economic pressure on marginal city and town centre streets, as well as an acceleration in the deterioration of affected areas. Counterbalanced to this is an awareness of the significant lead-in times to deliver high quality new retail developments and the importance of forward planning to ensure that in the future the market is not constrained in future years, resulting in less consumer choice and less competition.





PART 5

Retail Market Analysis and Future Growth

Introduction

- 5.1 The purpose of this chapter is to set out the quantitative analysis aspect to the revised retail strategy in quantifying shopper behaviour and to determine the retail trading performance and future needs of:-
- the GDA as a whole;
 - the Dublin and Mid East Regions;
 - each of the seven constituent Council areas;
- 5.2 In undertaking the review there was a clear need to update many of the key assumptions made in the 2001 Strategy, update information on the supply of retail, and to conduct a new shopper pattern survey. This chapter gives a summary of the key results from this work. Full details regarding the methodology adopted are set out in Appendix 1. This chapter examines two main areas- (i) report on the shopping patterns and trading performance currently in the GDA including mapping dominant retail centres; and (ii) estimating future floorspace need through a series of defined steps.

Assessment of the GDA Retail Economy

Introduction

- 5.3 The main objective of the household survey was to obtain comprehensive information on consumer shopping trip patterns and expenditure flows for convenience goods (food) and comparison goods (non-food) shopping within the region. For the purposes of the study the GDA and the surrounding counties were divided into zones (see **Figure 1A, Appendix 1, Section 2**).
- 5.4 Within the survey area as a whole, the catchment areas of the main centres were determined using survey data on retail expenditure patterns. The analysis permits the core, primary and secondary catchments (where they exist) to be determined for each centre. These are defined as:-
- core catchment -comprising those zones from which a centre attracts the majority of generated expenditure (i.e. 51% or more);
 - primary catchment- comprising those zones from which a centre attracts the largest single flow of generated expenditure (this may be less than 50%);
 - secondary catchment- comprises those remaining zones from which a centre attracts 10% or more of generated expenditure.
- 5.5 Beyond the secondary catchment, the full results show that certain centres may attract even smaller amounts of expenditure from additional zones. Such expenditure flows will typically account for very low proportions of overall centre turnover and can, for most analytical purposes, be ignored. These zones have therefore been excluded from the wider definition of a catchment area, although all expenditure flows are taken into account in the quantitative retail floorspace need assessment.

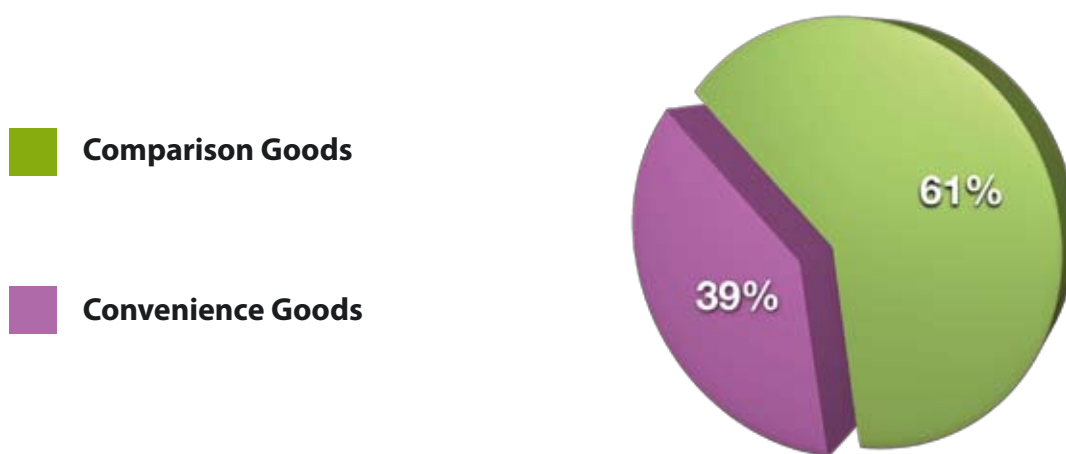
Analysis of Results

- 5.6 Using the results of the household survey, the retail trading performance of the GDA retail economy as a whole for both main categories of goods at the base year of 2007 was assessed. In particular, the volume of consumer retail expenditure in-flows and out-flows to and from the GDA, and therefore the level of expenditure retention, were determined.
- 5.7 By relating the scale of these expenditure in-flows and out flows to the known 'pools' of available expenditure generated within the GDA, the total retail turnover of the GDA for each main category of goods

as at 2007²² was estimated. In addition, by expressing turnover as a proportion of available expenditure, the levels of expenditure 'retention' have been estimated for the GDA.

- 5.8 In relation to comparison goods, it is estimated that the GDA attracts an in-flow of €1529 million (including visitor/tourist expenditure in Dublin City Centre), but that some €263 million leaks out to competitor centres in other areas. Therefore, the GDA is a net importer of €1266 million of comparison goods spend. Moreover, the household survey indicates that retail floorspace in the GDA retains around 95% of the comparison goods expenditure generated within the area and had an estimated comparison goods retail turnover of some €6597 million in 2007.
- 5.9 The estimates of expenditure flow patterns for convenience goods show an in-flow of €209 million and an out-flow of €193 million for the GDA, which indicates the GDA is a net importer of just €16 million of convenience goods spend. These figures confirm that the GDA retains 95% of available convenience goods spend, the same as for comparison goods shopping. The convenience goods turnover estimate for the GDA as a whole in 2007 is €4,207 million.
- 5.10 Combining the two goods categories indicates that the GDA had a total retail turnover of €10,804 million in 2007. **Figure 5.1** below summarises the split between the two categories of goods. Overall, 95% of the total retail expenditure generated by GDA households is spent within the area, whilst just 5% leaks out to competitor centres.

Figure 5.1: GDA Retail Turnover by Category of Goods, 2007



Comparison Shopping

- 5.11 In examining the two Regions of the GDA separately it is estimated that €3981 million of comparison goods expenditure is generated by residents in the Dublin Region, of which €123 million leaks out with €20 million flowing to the Mid East Region and €103 million (84%) going to centres outside the GDA. Thus the Dublin Region retains 97% of its available comparison goods spend. However, it would be preferable to see even higher market retention from the perspective of sustainable travel patterns and town centre viabilities. In addition,

²² All monetary figures are expressed in constant 2006 prices.

it is estimated that the region attracts €1880 million of in-flow expenditure on comparison goods shopping, of which €491 million is from the Mid East Region and €1389 million originates from outside the GDA, including €1039 million of visitor/tourist expenditure to Dublin City Centre. Adding the in-flow spend to the retained expenditure gives an estimated total comparison goods turnover for the Dublin Region in 2007 of €5738 million. **Table 5.1** provides further information on where the comparison goods expenditure generated by the residents of the Dublin Region is spent. In relation to turnover, **Table 5.2** overleaf indicates that residents of the Dublin Region support two-thirds of the comparison goods sales of the region's shops, with 9% of sales being generated by consumers living in the Mid East and 24% from longer distance shoppers (from the GDA hinterland) and visitors/tourists.

Table 5.1: Destination of Available Expenditure by Region: Comparison Goods, 2007

Region/Area	Available Expenditure (€million)	Destination of Generated Expenditure (Row %)			
		Dublin Region	Mid East Region	Outside GDA (incl. Hinterland)	Total
Dublin	3981	97	0.5	2.5	100
Mid East	1350	36	52	12	100
GDA Hinterland	2195	16	6	78	100

Table 5.2: Origin of Turnover by Region: Convenience Goods, 2007

Region/Area	Turnover (€million)	Origin of Turnover (Row %)			
		Dublin Region	Mid East Region	Outside GDA	Total
Dublin	5738	67	9	24 ¹	100
Mid East	859	2	82	16	100

Notes: ⁽¹⁾ Includes visitor/tourist expenditure.

Convenience Shopping

- 5.12 It is estimated that residents of the Dublin Region generate around €3024 million of spend, of which just €121 million leaks out of the area - €41 million to the Mid East Region and the remaining €80 million to centres outside the GDA (**Table 5.3**). This gives an estimated retention rate for convenience goods expenditure of 96%, marginally lower than for comparison goods shopping. Furthermore, it is estimated that there is €306 million of in-flow convenience goods expenditure to the Dublin Region, with €121 million originating from the Mid East Region and €185 million in-flowing from outside the GDA, including €92 million of visitor/tourist spend to Dublin City Centre. Adding the retained expenditure to the in-flow spend gives an estimated convenience goods turnover for the Dublin Region in 2007 of €3209 million (**Table 5.4**).

Table 5.3: Destination of Available Expenditure by Region: Comparison Goods, 2007

Region/Area	Available Expenditure (€million)	Destination of Generated Expenditure (Row %)			
		Dublin Region	Mid East Region	Outside GDA (incl. Hinterland)	Total
Dublin	3024	96	1	3	100
Mid East	1168	10	80	10	100
GDA Hinterland	1837	5	1	94	100

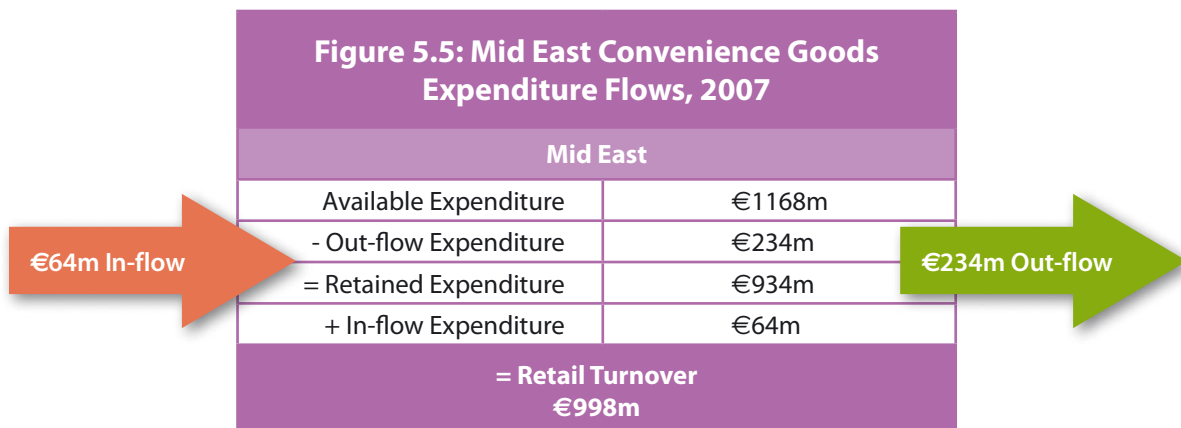
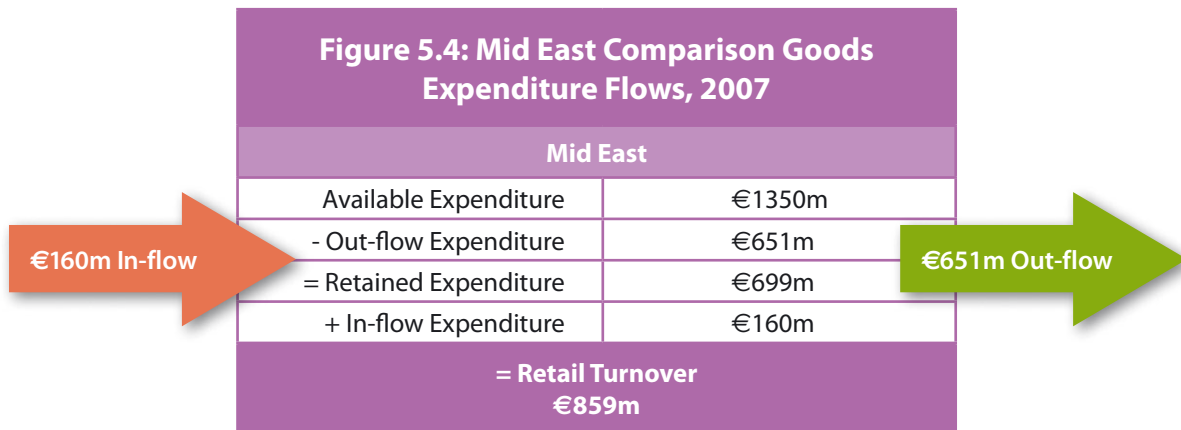
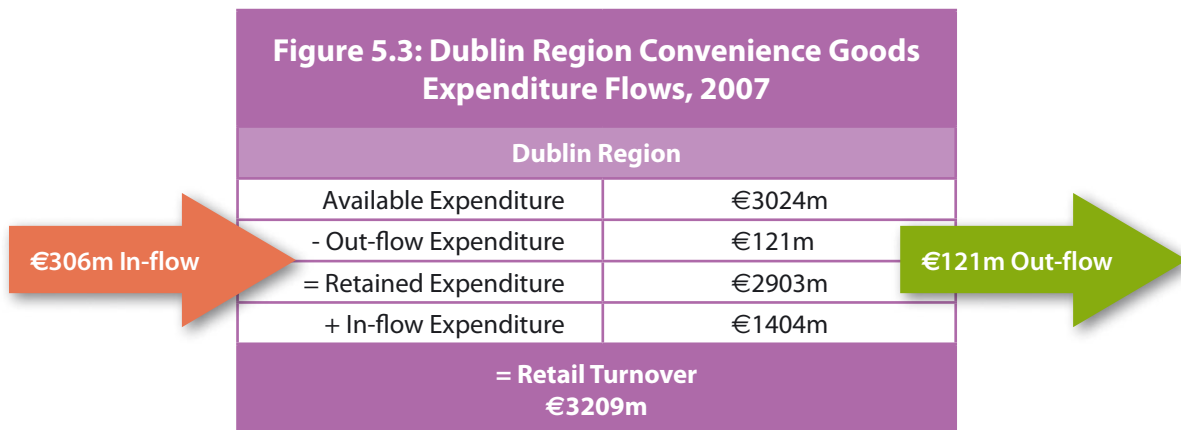
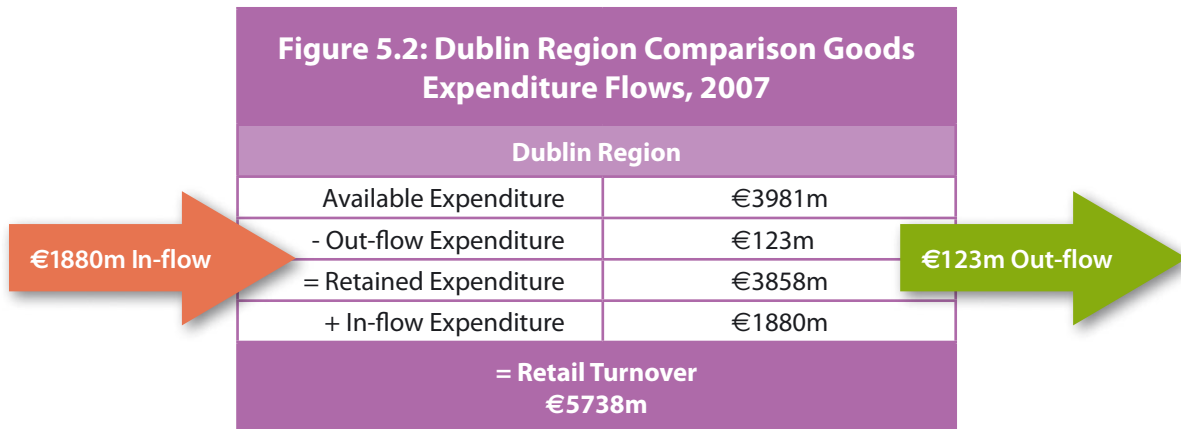
Table 5.4: Origin of Turnover by Region: Convenience Goods, 2007

Region/Area	Turnover (€million)	Origin of Turnover (Row %)			
		Dublin Region	Mid East Region	Outside GDA	Total
Dublin	3209	90	4	6	100
Mid East	998	4	94	2	100

Retail Trade Patterns by Region

- 5.13 The total retail turnover of the Dublin Region at the base year of 2007 is €8947 million, of which 64% is in comparison goods shopping (see **Figures 5.2** and **5.3** for convenience and comparison expenditure flows). In-flow spend accounts for €2186 million (of which €1131 million is visitor/tourist expenditure) or almost one-quarter 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.
- 5.14 For the Mid East, **Figure 5.4** indicates that €1350 million of comparison goods expenditure is generated within the region at the base year of 2007. Of this total, an estimated €651 million leaks out to competitor centres. This comprises of €491 million of flows into the Dublin Region and €160 million 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.
- 5.15 The residents of the Mid East generate €1168 million of convenience goods expenditure (**Figure 5.5**) of which €234 million leaks out of the region. Some €121 million flows to the Dublin Region, whilst the balance of €113 million 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 €64 million, of which €48 million is from the Dublin Region, gives an estimated aggregate convenience goods turnover for the Mid East of €998 million, equivalent to 31% of that for the Dublin Region.
- 5.16 The combined retail turnover for the Mid East in 2007 is therefore €1857 million, 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 €224 million of spend, but leaks €885 million. 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.





Retail Trade Patterns by Council Area

Comparison Goods

- 5.17 Three of the Counties in the Dublin Region (Dublin City, Fingal and Dún Laoghaire-Rathdown) have in-flows of comparison goods expenditure which exceed the outflows, (see **Table 5.5**). Therefore, all three are net importers of non-food expenditure. In contrast, expenditure out-flows for South Dublin exceeds the in-flows and the county is therefore a net exporter of spending on comparison goods. This is a major change to the patterns of 2001 for Dublin. Dublin City has since the 2001 Strategy seen an increase in levels of outflow, and Dún Laoghaire-Rathdown has moved from being a high level net exporter of comparison shopping to being a net importer. Fingal continues to attract a strong inflow of comparison shopping and the percentage leaving the county has fallen.
- 5.18 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. Kildare County now retains higher percentage levels of expenditure than 2001 and Meath is now retaining slightly more trade in comparison goods.
- 5.18 The retail dynamics are also reflected in the variation in retained comparison goods expenditure across the GDA. Fingal achieves the highest level of retained expenditure (73%), followed by Dublin City (65%) and Dún Laoghaire-Rathdown (62%). However, South Dublin ranks below Kildare County. Counties Meath and Wicklow are the worst performers 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. However, the extremely low level of retained expenditure in some Mid East Counties must be addressed as part of this Strategy.



Convenience Goods

- 5.19 Unlike for comparison goods, most available convenience goods expenditure is spent locally, with all Counties achieving retention levels of 71% or more. 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 ensures that most trips for food shopping are relatively short compared to trips for comparison shopping- a pattern reflected in the survey findings.
- 5.20 For convenience goods Fingal is the only county in the Dublin Region which achieves a turnover in convenience goods shopping that is less than the expenditure generated by its own residents; in other words, the out-flows of convenience goods spending marginally exceed the in-flows. (see **Table 5.6**); highlighting an immediate need for increased convenience shopping in the County. For Dublin City, South Dublin and Dublin DLR in-flows exceed out-flows and therefore each County is a net importer of convenience goods expenditure. 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.

**Table 5.5: Consumer Retail Expenditure Flows by County:
Comparison Goods (€Million, 2007)**

County	Available Expenditure	Outflows	% Retained	Retained Expenditure	In-flows	Estimated Turnover	Percentage Net Leakage
	A	B		C=A-B	D	E=C+D	
Dublin City	1654	580	65%	1074	2013	3087	(87%)*
Fingal	816	218	73%	598	465	1063	(30%)
S Dublin	839	363	57%	476	272	748	11%
DLR	672	254	62%	418	422	840	(25%)
Meath	417	193	54%	224	25	249	40%
Kildare	514	203	59%	311	140	451	12%
Wicklow	365	230	37%	135	24	159	56%

* Brackets indicate net importer

**Table 5.6: Consumer Retail Expenditure, Flows by County:
Convenience Goods (€ Million, 2007)**

County	Available Expenditure	Outflows	Retained Expenditure	In-flows	Estimated Turnover
	A	B	C=A-B	D	E=C+D
Dublin City	1235	221	1014	300	1314
Fingal	638	97	541	91	632
S Dublin	641	114	527	152	679
DLR	510	57	453	131	534
Meath	401	118	283	14	297
Kildare	453	97	356	53	409
Wicklow	314	57	257	35	292

Centre Dominance

- 5.21 Centres or retail locations which capture the largest single share of available consumer retail expenditure within a zone may be described as being dominant within that area. **Figures 5.6** and **5.7** show centre dominance across the survey area at the base year of 2007 for comparison goods and convenience goods shopping respectively. The maps provide a good visual indication of the relative strength of centres across the GDA and its shopping hinterland for each category of goods.
- 5.22 The relative dominance of Dublin City Centre for comparison goods shopping is evident from **Figure 5.6**. Nevertheless, its geographical influence is constrained by the ring of purpose built shopping centres such as Blanchardstown, Liffey Valley, Tallaght and Dundrum. Of these, Blanchardstown exerts a particularly strong influence, whilst a weaker Tallaght allows the city centre to extend its dominance a little further to the south east (Zone 11).
- 5.23 **Figure 5.6** clearly shows the dominant role of the purpose built shopping centres for comparison goods shopping – Dundrum’s dominance extends to three zones, whilst Blanchardstown covers two zones. Liffey Valley and Tallaght each dominate a single zone. Within the Mid East Region, Navan exerts a major influence to the north as does the Naas/Newbridge/Kilcullen grouping to the west. To the south Dundrum’s dominance (Zone 21) adjoins that of Arklow (Zone 22), thus over-laying the more shallow catchments of Dun Laoghaire, Bray and Wicklow.
- 5.24 **Figure 5.7** (overleaf) maps dominance for convenience goods shopping. Unlike for comparison goods, but not surprisingly, Dublin City Centre’s influence is now confined to a single zone (Zone 1), since the city centre’s retail offer is primarily in non-food shopping. Furthermore, the dominance of the purpose built shopping centres is also much less for food shopping than for comparison goods. In general, the maps confirm the more localised nature of food shopping, with no less than 24 centres dominating the 28 zones within the survey area, compared to only 15 for comparison goods shopping.

Catchment Areas of Major City and Town Centres

- 5.25 For each of the major city²³ and town centres within the GDA, catchment area maps have been prepared in relation to comparison goods shopping only²⁴. The catchment areas have been defined using the methodology described in the introduction to this chapter above. The maps are presented in **Figures 5.8** to **5.17** overleaf²⁵.
- 5.26 The individual centre maps confirm that Dublin City Centre generates by a considerable margin the largest comparison goods catchment area, embracing no less than 20 of the 28 zones, including all 13 zones within the Dublin Region, five of the 10 zones in the Mid East and two zones outside of the GDA (zones 25 and 26). The motorway network, in combination with the location and relative size and attractiveness of competitor centres, means that the “pull” of Dublin City Centre is much stronger to the west than either the north or south.
- 5.27 The maps show the impact of each centre in drawing trade from both within its immediate catchment and from surrounding zones not immediately proximate - with Dundrum, Blanchardstown and Naas/Newbridge drawing a level of trade across large areas; and highlighting the lack of impact of some major town centre designations - such as Dún Laoghaire and Bray where these centres do not dominate comparison shopping within their own catchment areas.

23 All Level 1 and Level 2 centres, as defined by the Shopping Hierarchy proposed by the existing GDA Retail Strategy

24 As convenience goods shopping is mainly undertaken locally the centre catchments in most cases would be very limited.

25 Wicklow Town does not feature in these maps as it attracts less than 10% of the comparison goods expenditure generated in its own zone and therefore is not within the definition for the maps.

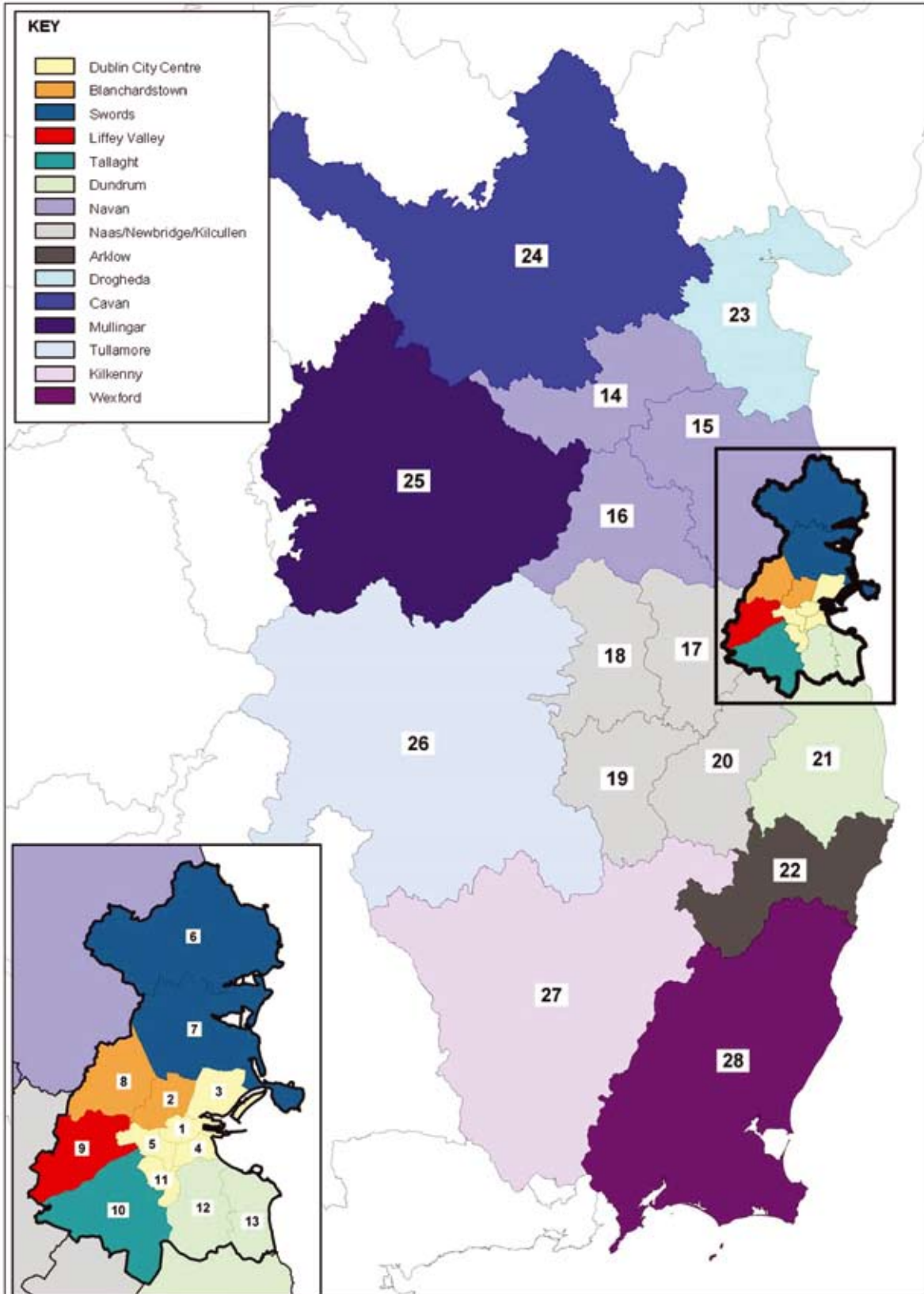


Figure 5.6
Dominance Map, Comparison Goods



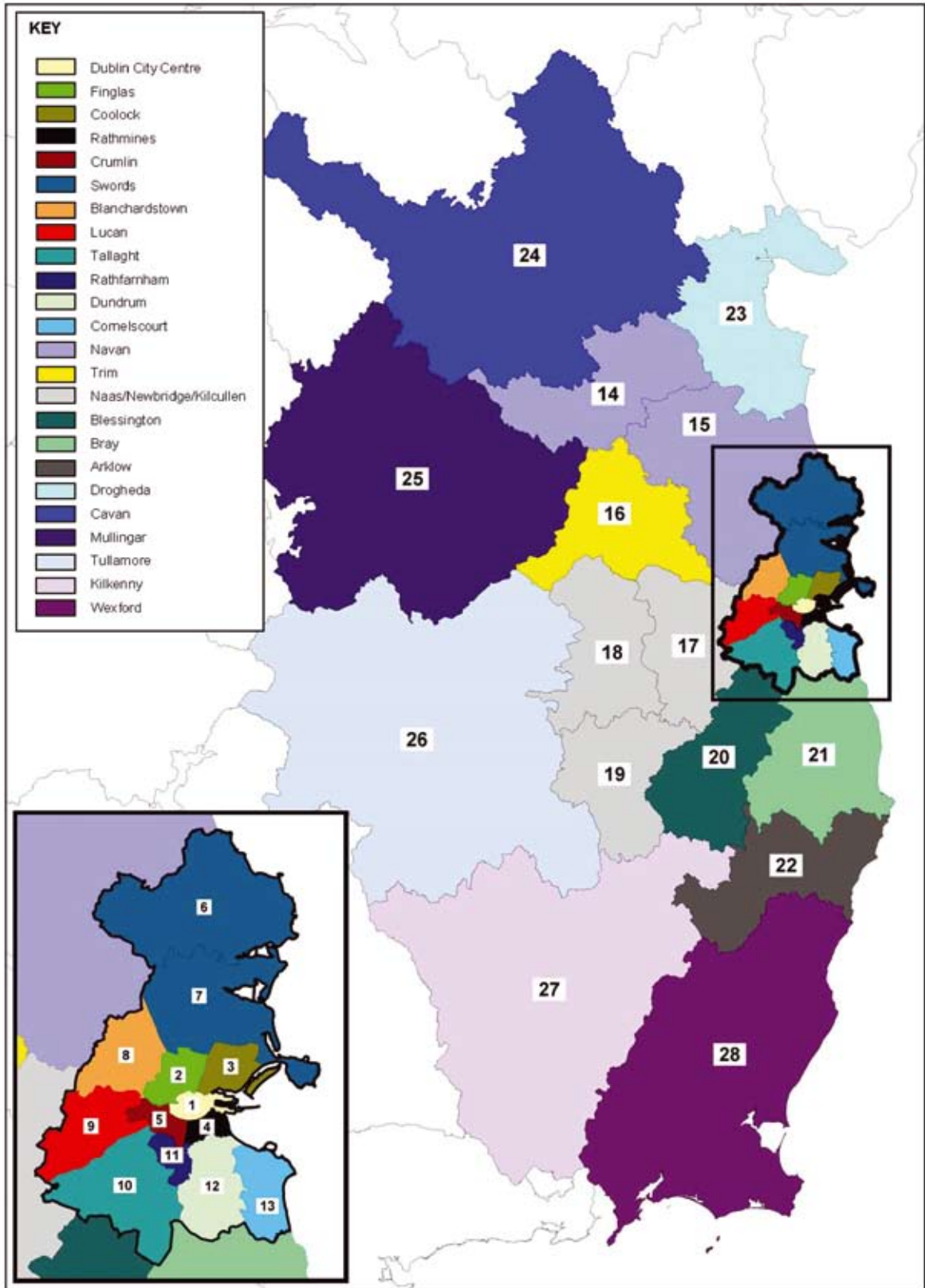


Figure 5.7

Dominance Map, Convenience Goods



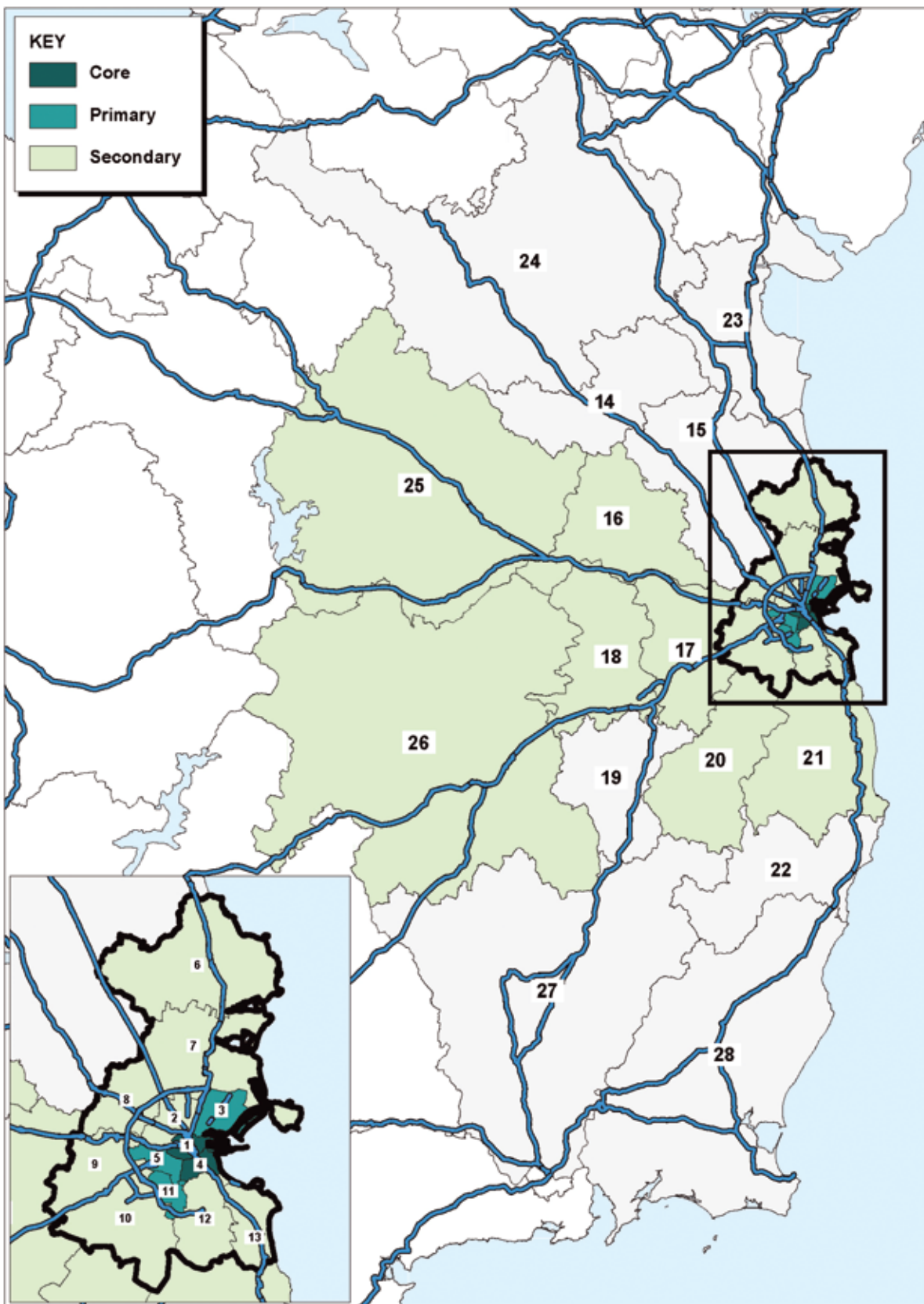


Figure 5.8

Dublin City Centre, Catchment Area for Comparison Goods, 2007



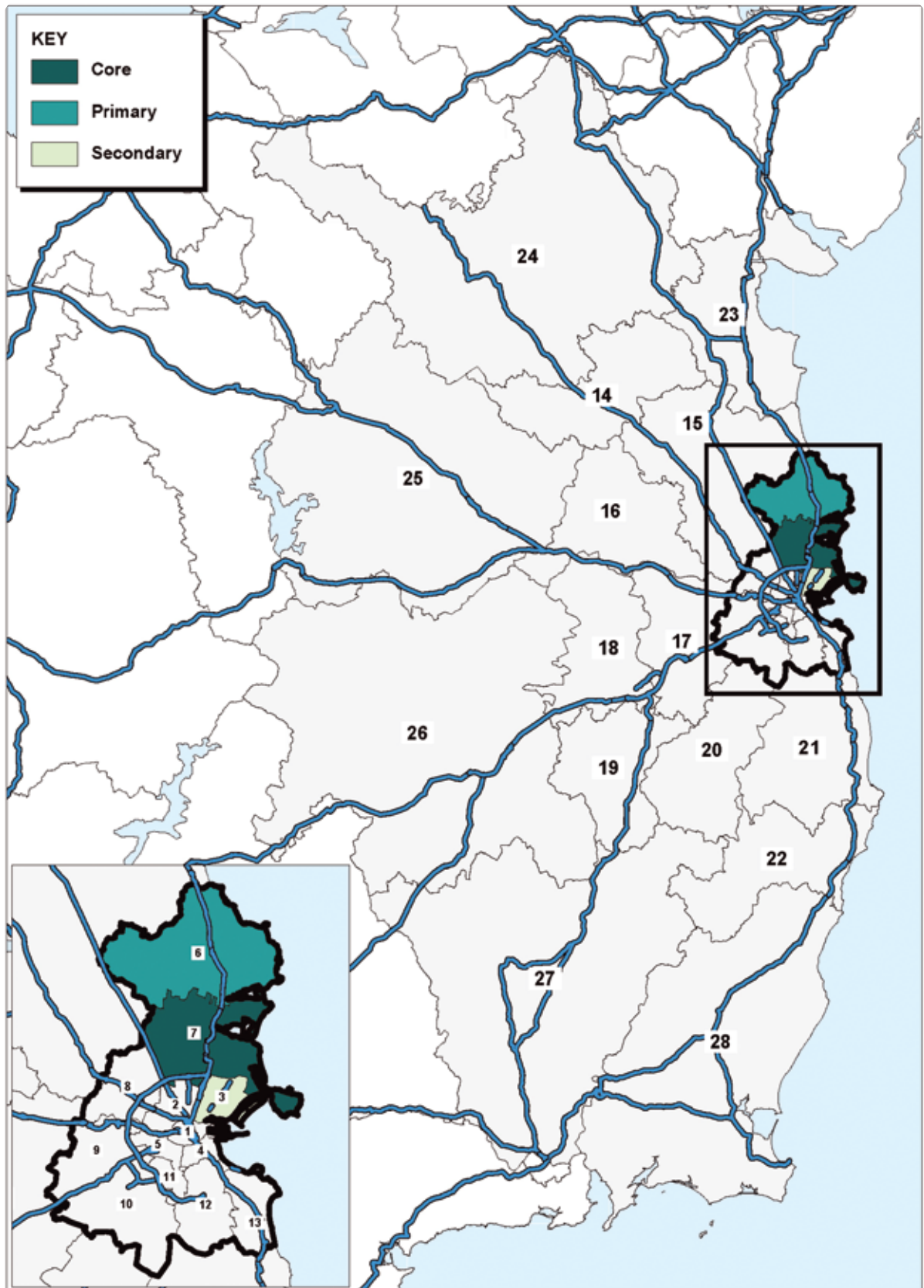


Figure 5.9

Swords, Catchment Area for Comparison Goods, 2007



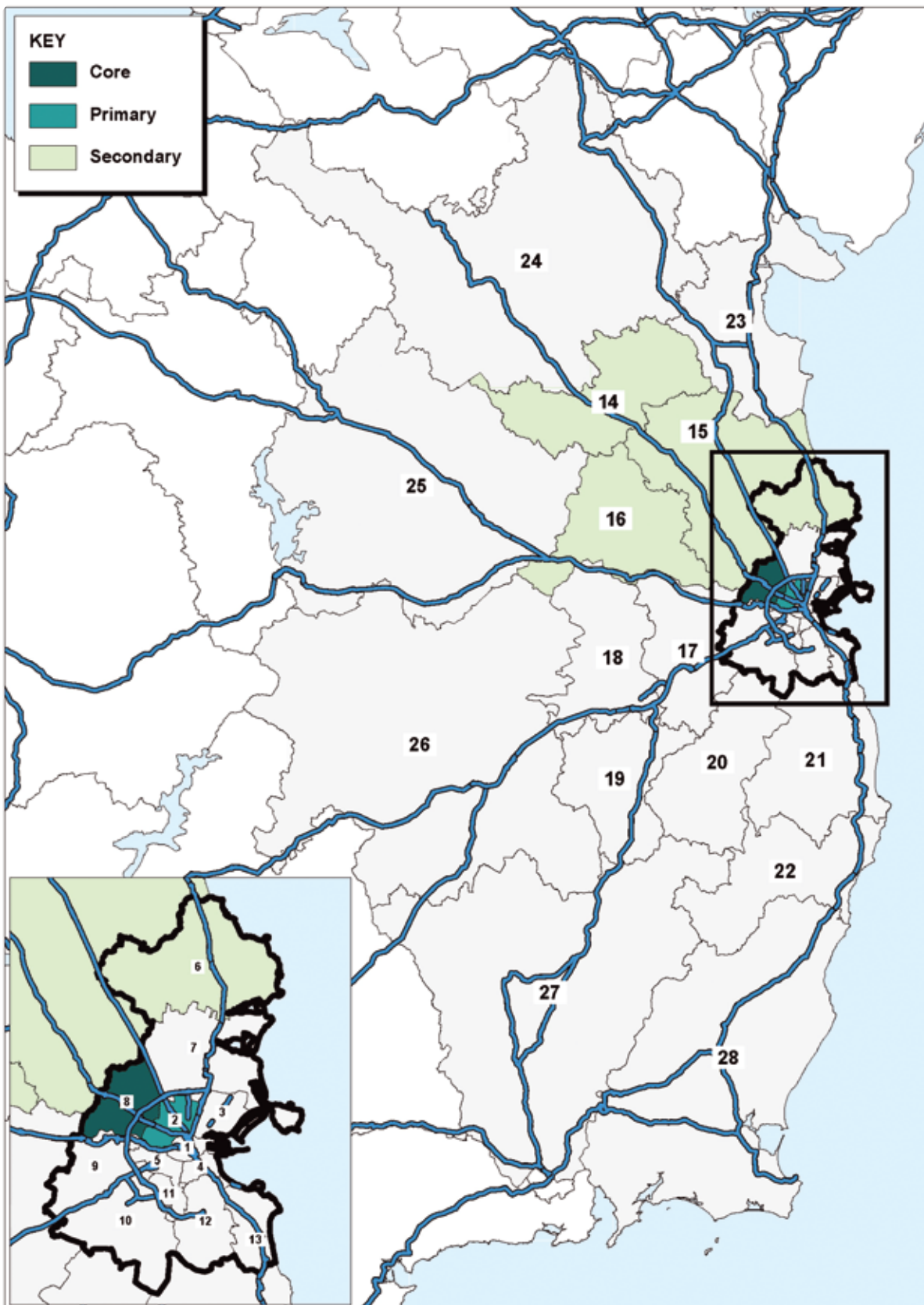


Figure 5.10

Blanchardstown, Catchment Area for Comparison Goods, 2007



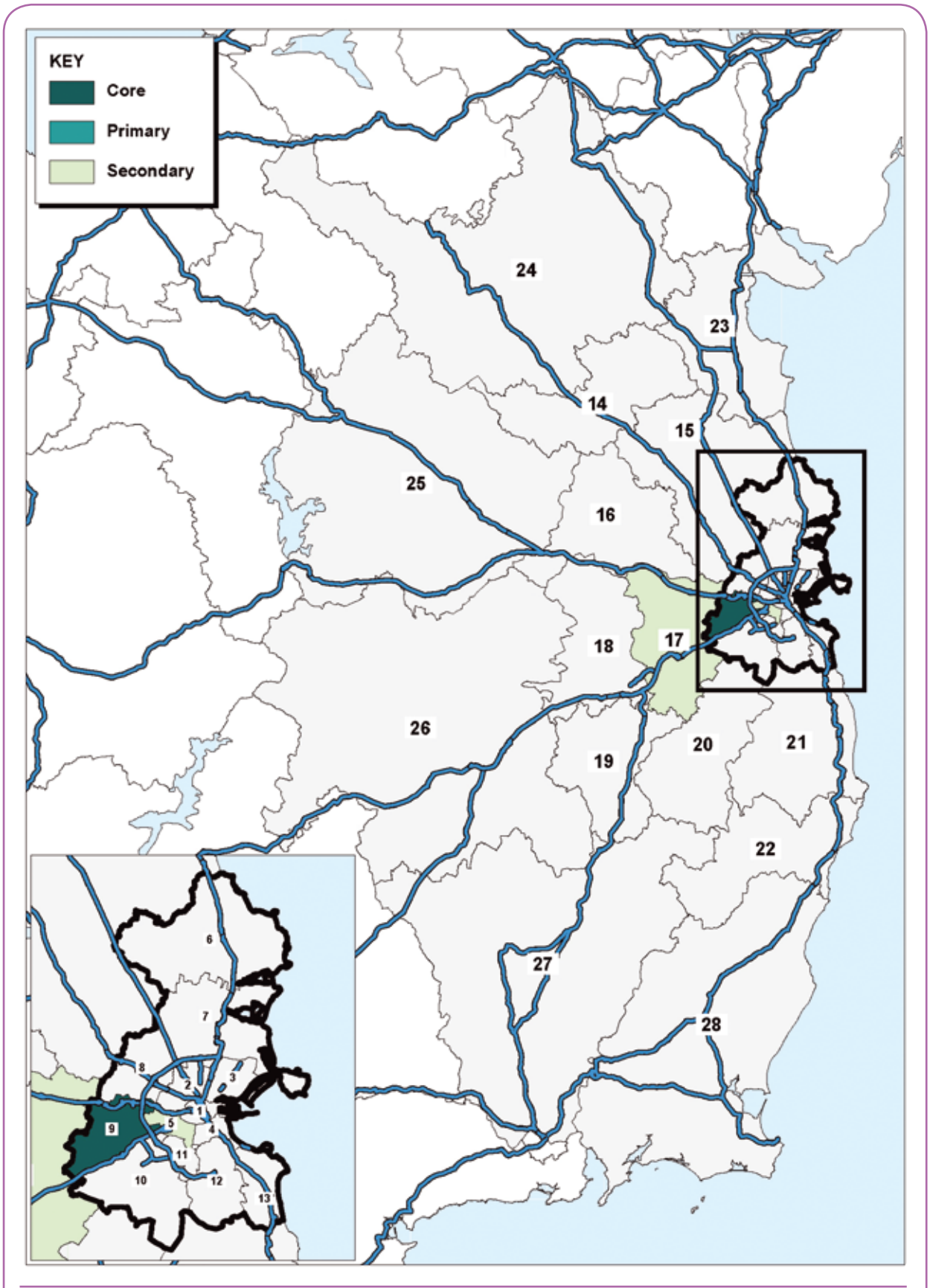


Figure 5.11

Liffey Valley, Catchment Area for Comparison Goods, 2007



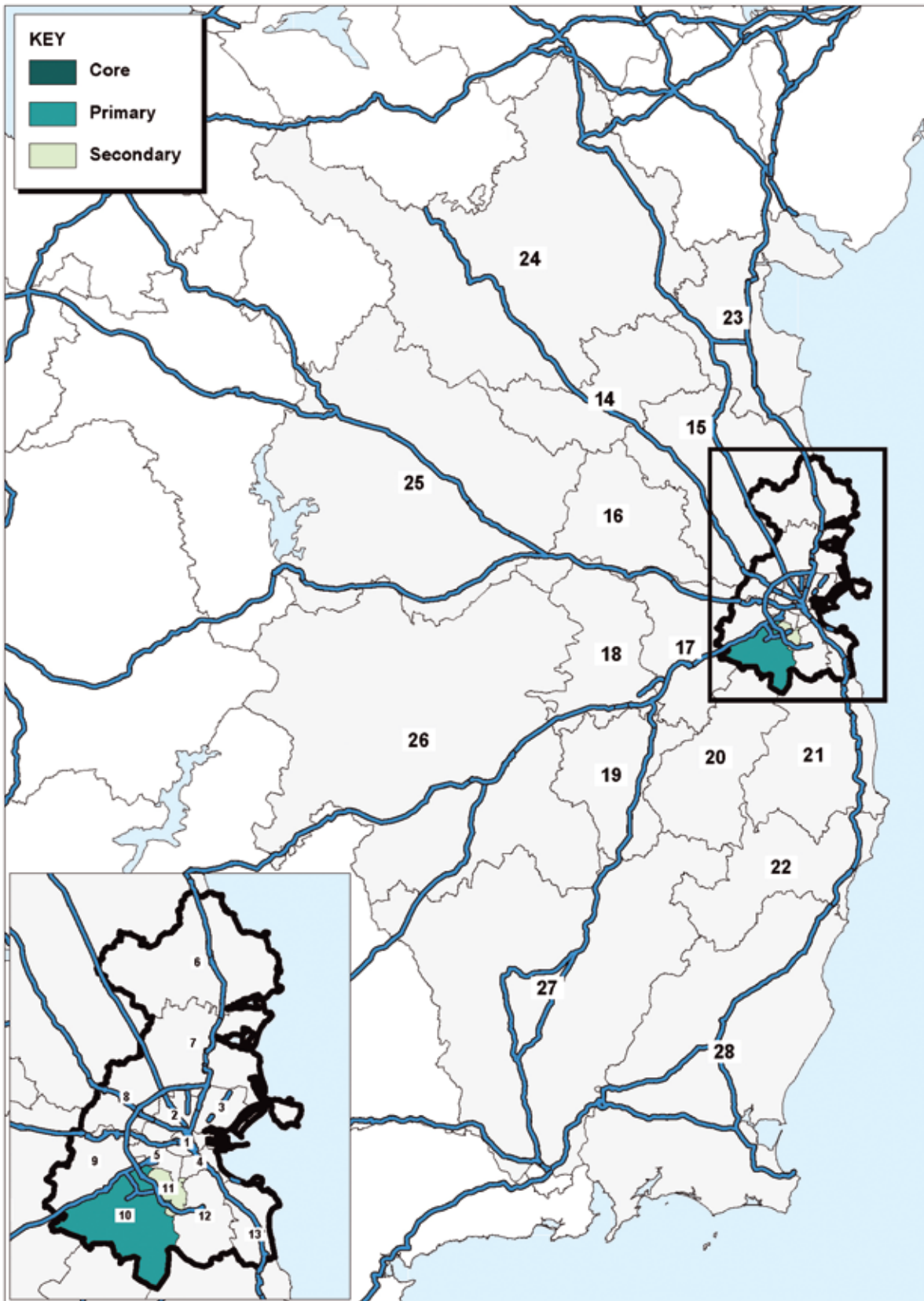


Figure 5.12

Tallaght, Catchment Area for Comparison Goods, 2007



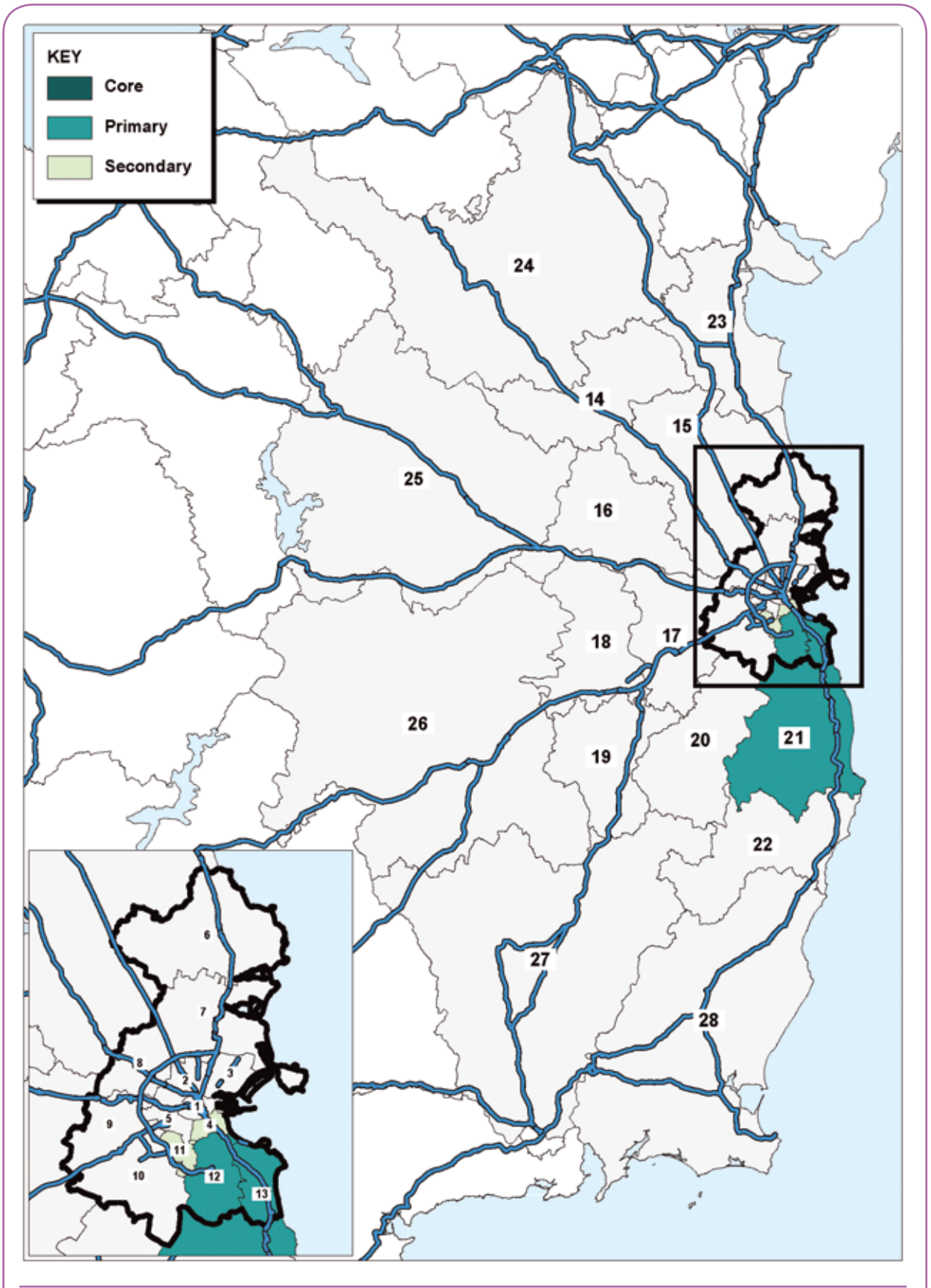
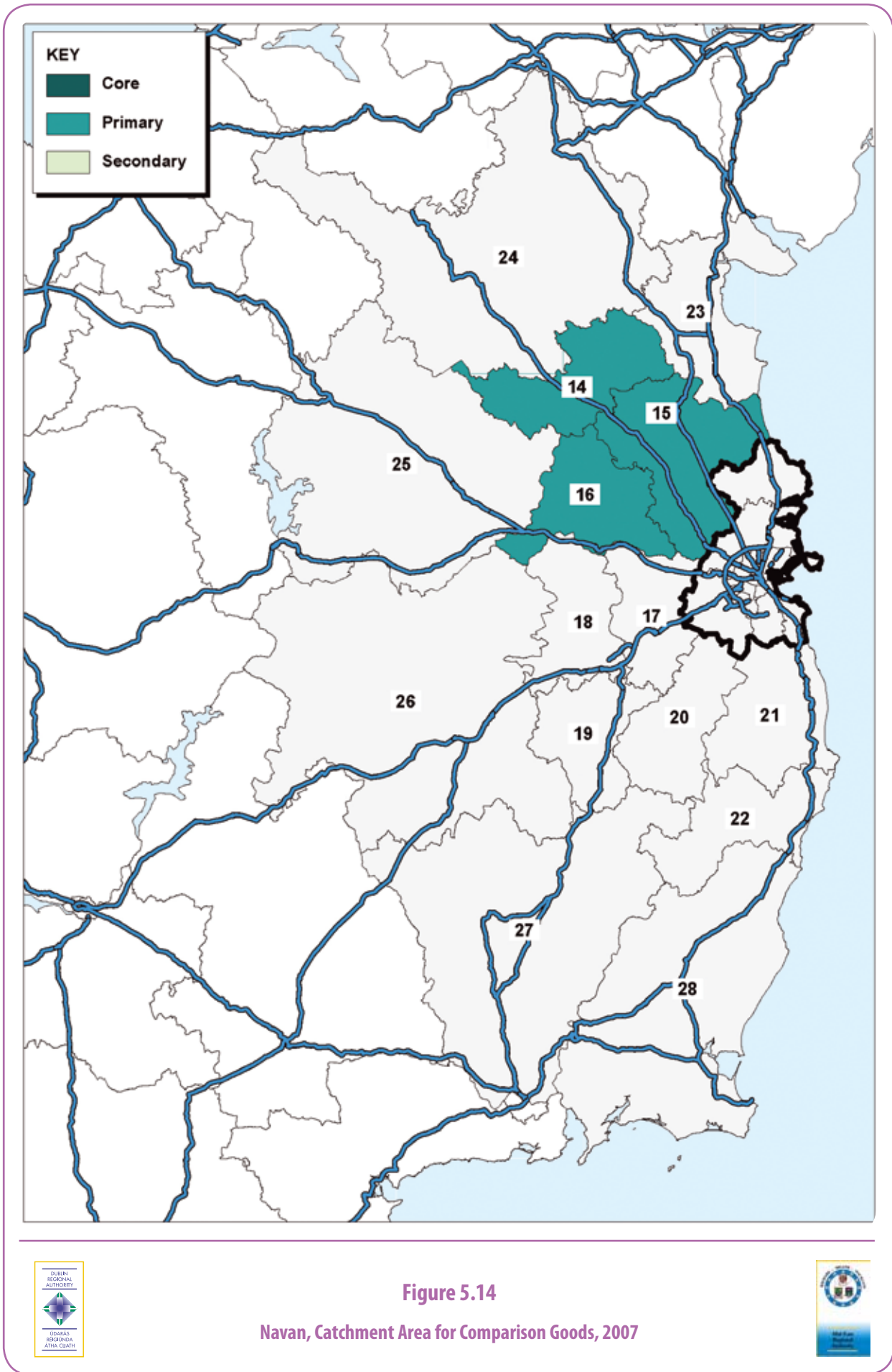


Figure 5.13

Dundrum, Catchment Area for Comparison Goods, 2007





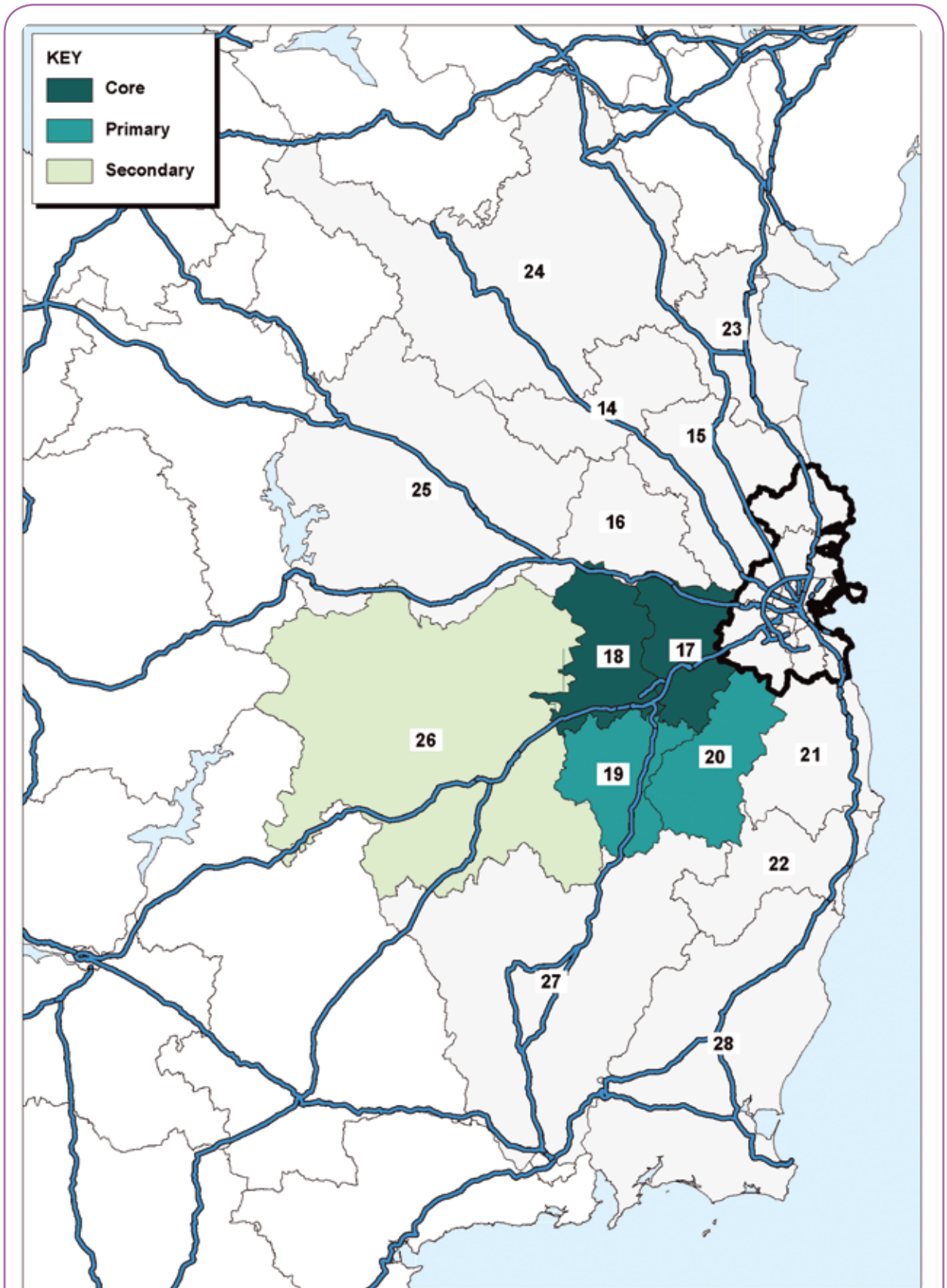


Figure 5.15

Naas/Newbridge, Catchment Area for Comparison Goods, 2007



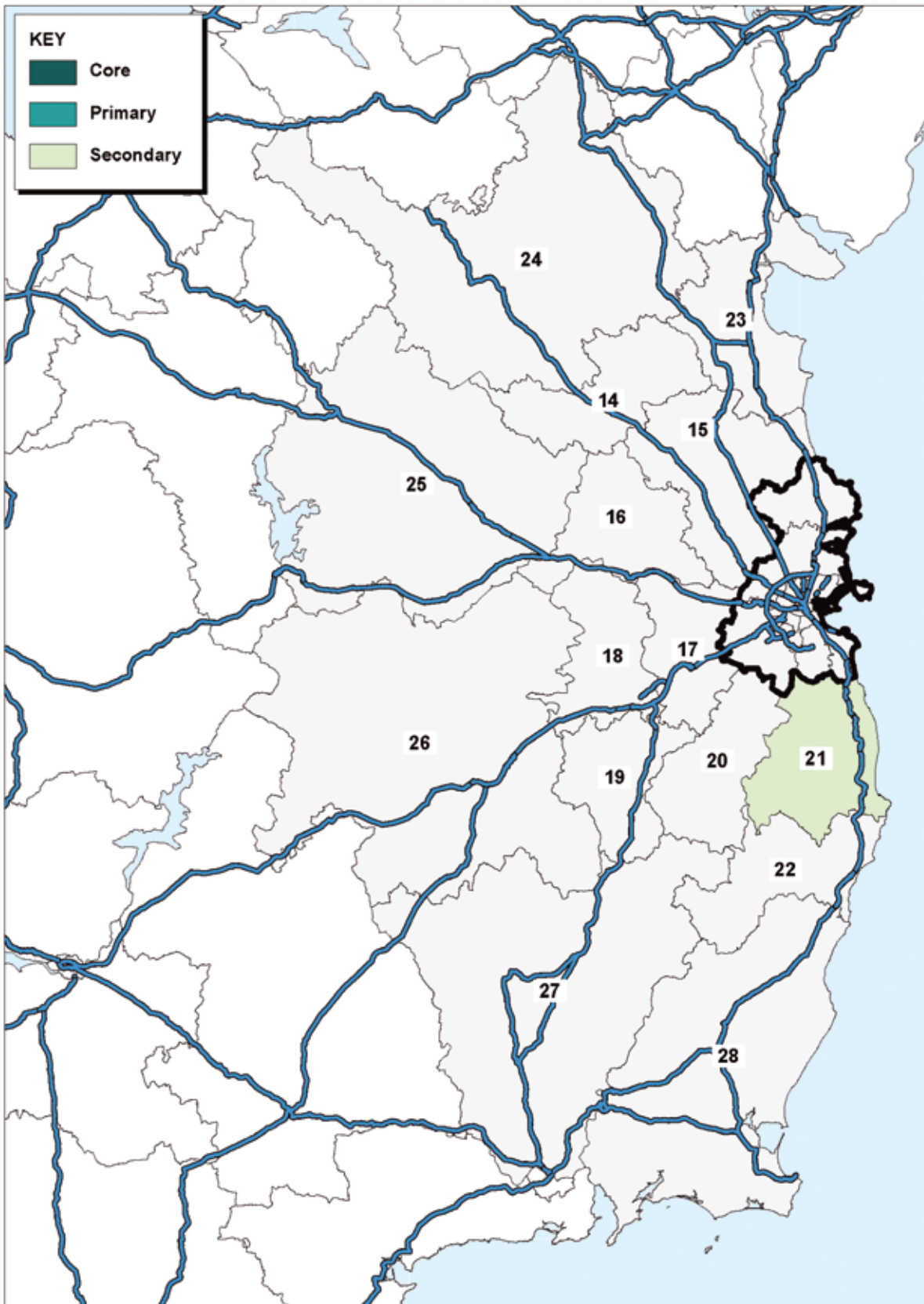


Figure 5.16

Bray, Catchment Area for Comparison Goods, 2007



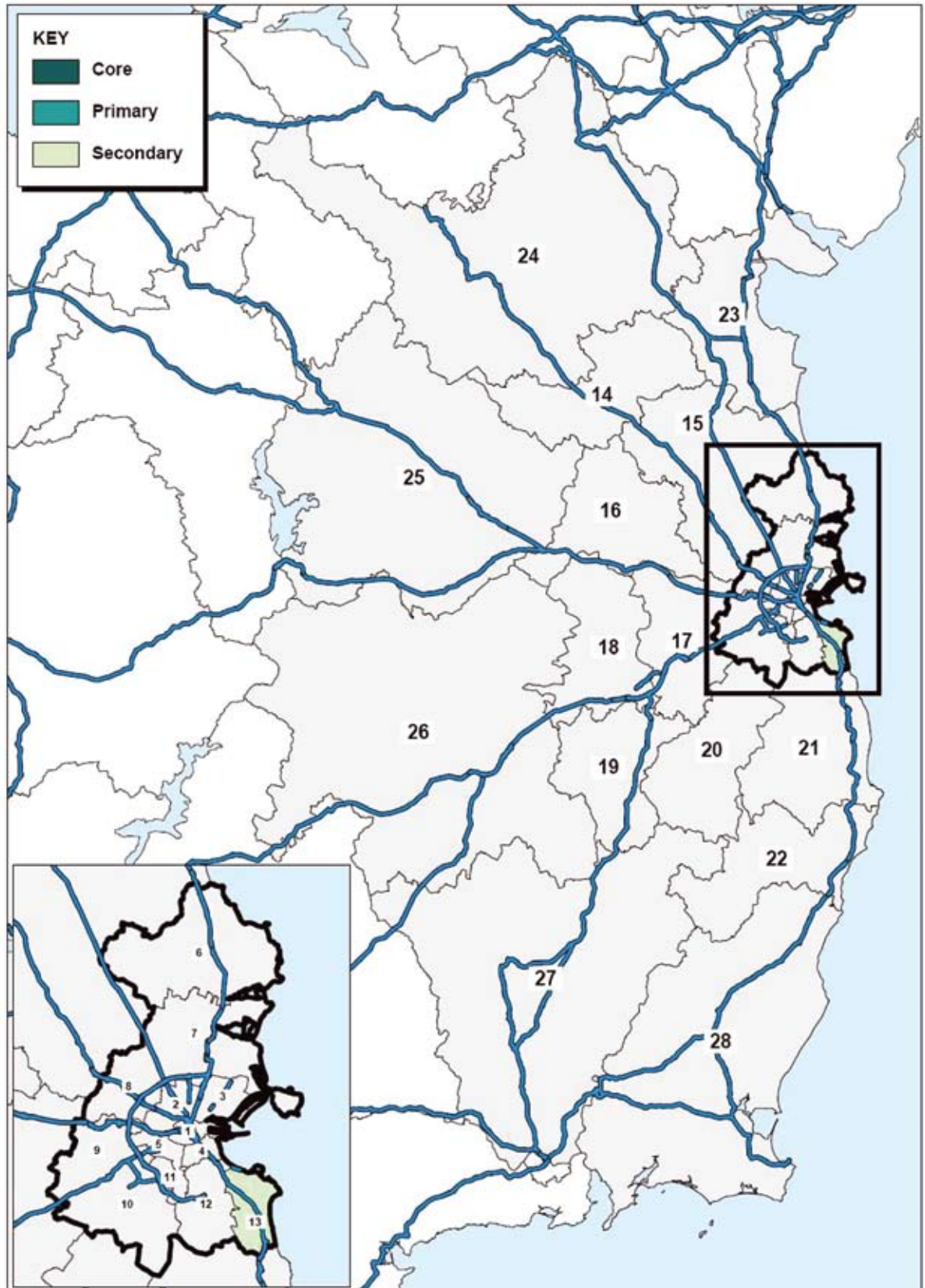


Figure 5.17

Dún Laoghaire-Rathdown, Catchment Area for Comparison Goods, 2007





Future Retail Demand

- 5.28 This section describes the approach used to estimate the quantitative need for future additional retail floorspace within the GDA and its constituent Council areas. The quantitative assessment was carried out separately for convenience goods and comparison goods. The calculation of floorspace updated the 2001 database from permissions supplied by each Council, with developments which were on site or completed highlighted for addition to the list of available retail floorspace in the GDA. The baseline date for this information was the 1st of September 2007. Due to the current and predicted economic climate and based on experience of retail development activity as well as expert opinion, only built retail was factored into the assessment of available floorspace.
- 5.29 The analysis estimated the amount of over/under-trading at centres in the base year (2007) by comparing actual (survey-based turnovers) against benchmark turnovers and takes any expenditure “surplus” or “shortfall” into account in determining the available headroom expenditure at the forecast year of 2016. This is considered to be realistic and robust approach, since it reflects the current variability in the retail performance of centres across the GDA. All monetary figures are given in **constant 2006 prices**. The results of this retail floorspace need assessment help shape and underpin the Update to the GDA Retail Strategy which is set out in chapter 6.

Approach to Quantifying Retail Floorspace Need

- 5.30 Separate quantitative retail need assessments were carried out for comparison goods and convenience goods. Key assumptions and technical adjustments made in the preparation of the figures are discussed in Appendix 1. For both comparison and convenience a short description of the methodology used is set out below as a series of steps. (More detailed descriptions are contained within Appendix 1.)

Step 1: Calculate Total Available Expenditure in the Survey Area- using information from expenditure per head and population growth estimates broken into the 28 zone areas, and adjusted to take account of special forms of trading.

Step 2: Application of “Market Shares” to Determine Amount of Retained Expenditure- using results of the three shopping surveys, future population growth patterns, extent of catchment areas and assessing the distribution and volume of locally available consumer expenditure and balancing it against retail turnover estimates.

Step 3: Determine Whether the Existing Retail Economy is Trading at Equilibrium- assess levels of under or over trading derived from examining relative mixes of bulky and non bulky goods; published company average sales; number of multiple traders; centre sizes; ranking and rental levels.

Step 4: Calculate Growth in Retained Expenditure through to the Forecast Years- Having determined the base year (2007) “market shares” and levels of retained comparison goods expenditure within the GDA as a whole and its constituent Council areas, the principle of market shares is used to calculate how much more spending or trade the GDA could expect to attract in the future as a result of the forecast growth in available catchment area expenditure.

Step 5: Determine Level of Potential Headroom Expenditure in the Forecast Year- Not all of the increase in turnover potential within the GDA (and its Council areas) is available by the forecast year to support additional comparison goods shopping. In this stage account is taken of the reduction in some of the forecast growth in expenditure as it is allocated to existing retailers as they increase their sales productivities in real terms over time.

Step 6: Determine Level of Residual Headroom Expenditure in the Forecast Year- this stage adjusts the potential headroom expenditures calculated for 2016 by taking into account the extent (if any) of any over or under-trading that is occurring at the base year (2007).

Step 7: Estimate Capacity for Additional Retail Floorspace at the Forecast Years - the adjusted headroom expenditures are converted into retail floorspace requirements for the GDA and for each Council area.

Step 8: Allow for Retail Services within comparison retail projections- 20% is added to the retail floorspace requirements to reflect the high level of units which, when built, will be taken up by non retail uses- units such as hairdressers, bookmakers, coffee shops for example. (A description of how the figure of 20% is arrived at is set out in Appendix 6a).

Retail Floorspace Need Estimates

- 5.31 Due to the potential inaccuracies that come into play when preparing projections over long time periods, some caution needs to be attached to the retail floorspace need estimates, although 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 this report provide a realistic indication of the quantum of 'retail floorspace need' over the next eight years. (see **Table 5.7**). It is important to bear in mind that 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 NSS. 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.
- 5.32 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, it will not be possible to fully redress this leakage within the timescale of this 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 this 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 this Strategy of each Level 2 centre holding its own market requires a vision for retail in these towns will extends beyond the life of this Strategy. For this reason planning permissions may need to be granted for floor areas in excess of those stated in **Table 5.10** 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.
- 5.33 The *Retail Planning -Guidelines for Planning Authorities-* the Department of Environment, Heritage and Local Government 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 guidance**^{*26} 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 this 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. It is within this context that the results of the quantitative floorspace need assessment are now presented.

*26 This is an emphasis of this report.

Convenience Goods Floorspace Need

Table 5.7: Projected Convenience Goods Need by Council Area up to 2016.

Council	Gross Lettable Floorspace Need (sq.m) ²⁷
Dublin City	38,586
Dun Laoghaire Rathdown	28,555
Fingal County	48,429
South Dublin	47,318
Kildare County	11,020
Meath County	18,280
Wicklow County	15,099
GDA Total	207,287

²⁷2829

Comparison Goods Floorspace Need

Table 5.8: Projected Comparison Goods Need for GDA up to 2016.

Council	Gross Lettable ²⁷ Floorspace Need ²⁸ (Low Projection, sq.m)	Gross Lettable Floorspace Need ²⁹ (High Projection sq.m)
Dublin City	181,256	247,168
Dun Laoghaire Rathdown	96,227	131,219
Fingal County	88,145	120,198
South Dublin	80,027	109,128
Kildare County	58,943	80,377
Meath County	49,525	67,535
Wicklow County	50,794	69,263
GDA Total	604,916	824,887

- 5.34 It has been analytically forecast that there will be, by 2016, a strong need for new convenience goods floorspace to be built within both the Dublin and Mid East Regions and in all seven Council areas. 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 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

²⁷ Gross lettable includes all areas available for let bar common mall areas/circulation areas.

²⁸ This figure includes the 20% allowed to account for future units let to retail services following completion of the development. Assumes all floorspace will be taken up by bulky comparison goods (retail warehouse units).

²⁹ This figure includes the 20% allowed to account for future units let to retail services following completion of the development. Assumes all floorspace will be taken up by non-bulky comparison goods.

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.^{5.35} In relation to comparison goods (see Table 5.8), 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 retail floorspace should take place in accordance with the policy recommendations contained within this report 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.

Allowing for Future Demand

- 5.36 As alluded to earlier in this document, achieving equilibrium between the impact of overprovision resulting in decline in a number of important centres, and under provision where competition and choice are suppressed is a delicate balance and is in many ways unachievable due to constant changing circumstances of population shifts in the GDA and economic flux as well as activity in the retail sector.
- 5.37 However, it is the purpose of this analysis to **set a floorspace need** range, (subject to the many factors on which the demand figures are based); that Councils **should generally be within, in order to facilitate the needs of future population growth**; and to ensure the preservation of the viability and spatial robustness of existing centres. In assessing the scale of retail to be provided in a County, Town or City retail strategy three key issues must be borne in mind -
- (i) the extent of non-retail uses in retail developments;
 - (ii) the loss of existing retail through changes of use/demolitions; and
 - (iii) the provision for delivery of retail post 2016.

In response to issue (i) the figures have been adjusted by 20% both with regard to floorspace built since 2001 and on future floorspace needs projected to reflect the impact of non retail uses such as beauticians/banks/coffee shops occupying existing and future retail units.

- 5.38 For issue (ii) assessment as presented assumes all existing retail floorspace will continue to trade viably even when additional new floorspace is built. In practice, this may be considered unlikely, as older, less well configured and poorly located floorspace – that which is no longer ‘fit for purpose’ – falls out of retail use. This could ‘free-up’ turnover that would go towards helping support some of the new retail provision proposed. The extent to which existing floorspace is allowed to fall out of productive retail use is a decision for each of the seven Councils. There is therefore a need to allow for and take into account of in each Council retail strategy the scale of changes of use or redevelopment permissions granted where retail provision in the County has eroded, reducing existing provision. It is recommended that some record is kept by each Council of both permissions and commencements which add to retail provision in the given Council area and permissions and developments which remove retail from use.
- 5.39 In the context of issue (iii) it is vital that the significant lead in times for certain types of development are taken into account- particularly schemes which augment existing retail or are infill town centre schemes which bring positive attributes to town centres. There is also a need to build into the last years of the Strategy flexibility where schemes may not come on stream until after the end date of 2016. For complex sites, applications may seek up to 10 year permissions where development would occur on a phased basis so that all of the issues relating to servicing the development can be addressed and the planning authority can fully assess the long term development strategy for the site. It is often the case for such schemes that the second and/or third phases will not be constructed until the last years of the permission- supplying demand that is not modelled in this Strategy. Such integrated approaches to complex schemes where they fit with the overall vision for a town should not be automatically rejected due to the scale of retail proposed, when a reasonable volume of retail is proposed to cater for demand post 2016.



- 5.40 To accommodate this therefore it is recommended that individual retail strategies at Council level build in a 20-25% flexibility factor (or greater in areas with exceptionally high leakage). The quantitative assessment provides the Council's with an indication of the quantum of additional convenience and comparison goods floor space that is likely to be supported by available expenditure at 2016. The floor space figures are inclusive of existing retail commitments. In practice, the development cycle for many retail developments, particularly the larger ones, may take some time – five to ten years from project inception to completion is not uncommon. Consequently, a number of schemes which may come forward for planning between now and 2016 may not be completed and trading until after the end year of this Update. It would be wrong in these circumstances to refuse consent to a scheme simply because it breached the County floor space need total at 2016. This approach is too rigid and clearly it is more realistic to allow for some flexibility in the interpretation of the floor space need figures.
- 5.41 Therefore in the Strategy the 2016 floor space need totals have been adjusted upwards by a maximum of 25% for comparison goods and 20% for convenience goods to allow for the proper consideration of those applications that are submitted prior to 2016 but are not scheduled to be completed until after 2016 (but before 2021). There is ample justification for making this adjustment, since it is very likely that the GDA's population and consumer spend per head will increase beyond 2016, thus continuing the established trend between 2007 and 2016. This will generate a further increase in quantitative floor space need over the five year period. Allowing for a further uplift in floor space need of 20-25% between 2016 and 2021 is likely to be a conservative estimate. Clearly, the floor space of any schemes opening post 2016 and falling within the adjusted floor space need totals must be taken into account in any future update of this study. This figure should be re-assessed in light of both the scale of population growth in the county and whether it is above or below the RPGs figures used in the Strategy and the levels of economic activity both nationally and locally which impact on the retail spend by individuals in any catchment area. Below is set out the figures for each category including this adjustment.

Table 5.9: Projected Convenience Shopping Need by including 20% to Facilitate Future Demand

Council	Gross Lettable Floorspace Need (sq.m)
Dublin City	46,303
Dun Laoghaire Rathdown	34,266
Fingal County	58,115
South Dublin	56,782
Kildare County	13,224
Meath County	21,936
Wicklow County	18,119
GDA Total	248,744

Table 5.10: Comparison Goods Need for GDA up to 2016 including 20% to Facilitate Future Demand

Council	Gross Lettable Floorspace Need ²⁹ (Low Projection, sq.m)	Gross Lettable Floorspace Need ³⁰ (High Projection sq.m)
Dublin City	217,508	296,601
Dun Laoghaire Rathdown	115,472	157,463
Fingal County	105,774	144,238
South Dublin	96,032	130,954
Kildare County	70,731	96,453
Meath County	59,430	81,042
Wicklow County	60,952	83,115
GDA Total	725,900	989,865

30

Conclusions

5.42 This strategic study seeks to provide a broad indication of the scale of need over the period to 2016 for additional comparison goods and convenience goods floorspace within the GDA and the seven Council areas. The need assessment is necessarily based on many technical assumptions and forecasts that are liable to change over time. Accordingly, this kind of study should ideally be updated from time to time to ensure that the need estimates continue to be robust. The volume of retail shown needs to be considered within the context of existing granted developments and commitments by Councils in Development and Local Area Plans.

30 This figure includes the 20% allowed to account for future units let to retail services following completion of the development. Assumes all floorspace will be taken up by non-bulky comparison goods.





PART 6

The Retail Planning Strategy

Introduction

- 6.1 The Retail Planning Strategy's primary purpose is to inform the statutory planning process and to ensure that adequate provision is made for retail development. The strategy provides indicative advice on the scope and need for new retail floorspace and how, in accordance with sustainable planning, it should be allocated. This Chapter sets out the key policy areas of the updated retail strategy for each Council. The implications of the quantitative analysis for the GDA and its constituent regions have an important bearing on the policy directions and hierarchy proposed. The Chapter is divided into four sections - (i) the retail strategy vision; (ii) the retail hierarchy for the GDA; (iii) policy guidance for each Council; and (iv) issues relating to the development management process.

Retail Strategy Vision

- 6.2 Sustainable development is one of the core principles underpinning current and future planning in Ireland. The planning system has a key role in facilitating and promoting sustainable patterns of development, including the creation of vital and viable town centres, which serve the surrounding developed areas and which serve also proximate rural communities in the hinterland area in a meaningful and practical way.
- 6.3 The central key objective arising from the overall vision is to promote the vitality and viability of town centres by:
- planning for the growth and development of existing centres;
 - promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in good environments which are accessible to all;
 - integrating the provision of high quality retail with mixed use in towns and centres to create attractive, active places.
 - Supporting the role of town centres as places to visit that have strong community and civic functions and roles to the surrounding population.
- 6.4 Other key objectives include:
- enhancing consumer choice by making provision for a range of shopping, leisure and local services, which generally allow choice to meet the needs of the entire community, including partially excluded groups and new areas of population growth;
 - supporting high quality, well designed efficient, competitive and innovative retail in town centres as an overarching objective in local/town plans, mixed with leisure, tourism, culture, business and other sectors; and
 - improving accessibility, ensuring that existing and new development is, or will be, accessible and well served by a choice of means of transport and where possible within walking distance.

Comments on Existing Position

- 6.5 Since 2001, the analysis undertaken as part of this study demonstrate that there is a more limited capacity for significant new development to be supported by growth in population and expenditure per capita. Also there are already a large number of permissions for retail granted where construction has not yet taken place. Consequently, new provision could be at greater commercial risk and will need to draw trade from existing/ approved centres when they come on stream. Competition is positive but too much over supply can impact upon the vitality and viability of existing centres.
- 6.6 New large areas of housing are planned in all counties to cater for future population growth as part of integrated planning models seeking to develop fully equipped liveable communities. The new areas will need access to a full range of services, including retail, to meet their convenience and some lower level comparison needs. This is appropriate both in terms of providing a good quality of life to residents and encouraging sustainable patterns of development, and should reflect the proposed improvements to the public transport system as set out in Chapter 3.

- 6.7 However, as previously stated, there is a limited quantitative case to be put forward for the provision of new centres outside of those planned in the Regional Planning Guidelines and current Development Plans, and the allocation of additional district and local centres will therefore have to be put forward mainly on a qualitative basis. New district and local centres should generally only be designed to meet the week to week shopping needs of these new communities.
- 6.8 Where an application is made within existing defined major town or county town centres, it will not always be necessary to demonstrate the quantitative need for retail proposals in assessing such proposed developments. In setting out the retail impact of the development the report should focus on how the scheme will add/detract from the quality of the town centre- both in relation to improving retail, urban design, integration with the built fabric and quality of life in the town/centre. Quantitative and qualitative need must, however, be examined as part of any proposed application which would be in an edge or out of centre location and/or not in accordance with retail strategy hierarchy alongside a full sequential test of the proposed location. Provision of new retail floorspace should be made in line with the retail strategy hierarchy, and all such schemes granted are factored as meeting some of the overall allocation of need listed in Chapter 5.

The Retail Hierarchy for the GDA

- 6.9 A critical part of delivering the overall vision for the retail strategy is the recognition of the retail hierarchy as a core spatial policy around which future growth, rejuvenation and expansion in the retail sector needs to be focused in order to achieve the goal of vibrant and successful town centres. For the success of the strategy and the outlined vision, new retail provision in each Council area should be made in line with the retail hierarchy as set out in **Table 6.1** here and the associated adopted City or County Retail Strategies. It is up to each Council to set out the detail of the towns/districts which form Levels 3, 4 and 5 in the retail hierarchy.

Issues Arising from the Retail Hierarchy

- 6.10 The level of existing floorspace in each centre does vary considerably, even if the centres are at the same level in the hierarchy. Local plans and policies and the County retail strategies will need to place the floorspace provision suitable in each town within the context of proximity to and interaction with higher order centres, density of immediate surrounding population and the extent of rural hinterland served by the town/centre. Regard should be had to definitions outlined in the Department of Environment, Heritage and Local Government (DoEHLG) Guidance document, *Retail Planning- Guidelines for Planning Authorities*.
- 6.11 As part of the review of the 2001 Retail Strategy it was proposed that consideration be given to the sub-division of the Level 3 tier into two further sub-categories to reflect the different functions and size of the centres. This was not included as it could over complicate and restrict the development of centres unnecessarily. However, for a certain limited number of district/sub-county town centres within Level 3, located or proposed for areas of extensive and intense high density development providing for new towns/areas of over 10,000 population, the guideline of a maximum of 20,000 sq m net of retail provision can be extended by 10-15,000 sq m of lettable floor space to reflect the dense urban character of the development and the high population located within a short walking distance of the centre- where the area is not already served by an existing centre.³¹ Clear justification will need to be included in any City/County retail strategy outlining the case to support such a designation.
- 6.12 The identification of town and/or district centres at Level 3, as indicated in **Table 6.1** (overleaf), reflects the functions of the centres within this level of the hierarchy. It is up to the individual planning authorities in their retail strategies to determine the designation of town and/or district centres based on sound sustainable planning principles.

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

Table 6.1: Retail Hierarchy for the GDA

LEVEL 1	METROPOLITAN CENTRE
	Dublin City Centre
LEVEL 2	MAJOR TOWN CENTRES & COUNTY TOWN CENTRES
	Fingal: Swords, Blanchardstown
	South Dublin: Tallaght, Liffey Valley
	Dun Laoghaire: Dun Laoghaire, Dundrum
	Wicklow: Bray, Wicklow
	Meath: Navan
	Kildare: Naas / Newbridge, Leixlip (including Collinstown*)
LEVEL 3	TOWN AND/OR DISTRICT CENTRES & SUB-COUNTY TOWN CENTRES (Not definitive list, see text below)
	Dublin City: Finglas, Northside Shopping Centre, Ballyfermot, Rathmines, Crumlin Shopping Centre, Donaghmede Shopping Centre, Omni, Ballymun, Point Village and Poolbeg
	Fingal: Malahide, Balbriggan, Skerries, Charlestown.
	South Dublin: Adamstown, Crumlin (Ashleaf), Clonburris/Balgaddy, Clondalkin, Fortunestown, Kilnarnagh, 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 AND VILLAGES
LEVEL 5	CORNER SHOPS/SMALL VILLAGES

*Leixlip and the Collinstown area will gradually develop along a 20 year time period reaching level 2 status, (see text below).

** Dunboyne will gradually develop over the next 20 years towards level 2 status, (see text opposite).

- 6.13 Consideration should be given and viable opportunities encouraged, with regard to the re-configuration of the existing provision to accommodate large modern retail units in centres from Levels 1 to 3. If new centres are to be re-configured then consideration should be given to them being anchored by a medium/large convenience supermarket/foodstore either as a town centre extension or on a smaller scale as part of a district or local centre improvement; this may provide appropriate opportunities for discount convenience retailers.

- 6.14 Existing neighbourhood centres should only be extended/upgraded to become district centres when a proven need has been demonstrated. Larger centres have in the past been the focus for much development and investment and to some extent this should continue to be the case. However, the need for local shops and services is equally important within urban and rural areas. The identification of such centres should take place as part of the preparation or review of the City, Town or County Retail Strategy.

Level 1 Centres

- 6.15 As the centre at the highest grade in the hierarchy Dublin city centre is unique in the range and mix of retail and associated linked services provided, the levels of connectivity it offers and the wide hinterland and tourist trade it serves. As the primary centre for retail, located at the terminus of almost all public transport connections in the GDA, it is essential that the City continues to re-invent itself to provide a modern attractive retail environment that can compete both with the modern level 2 centres but also with other international cities in both attracting trade and new retail formats.

Level 2 Centres

- 6.16 In relation to Level 2 centres, it is very important that in order to achieve a sustainable and inclusive strategy such centres offer the widest access to shopping activities for the greatest number of people. To achieve this objective, this strategy adopts a policy of 'structured choice', which concentrates the supply of retail facilities in the most accessible places. The most appropriate location for retail growth (outside of the district centres to meet the population growth) is in the Level 1 and 2 centres.
- 6.17 This will help reinvigorate existing major/County town centres which require modernisation. In planning for growth in town centres, planning authorities should allocate sufficient sites and expansion areas to meet the identified need; and where necessary use compulsory purchase powers to bring forward important sites. Large town centre schemes may require a longer period of time to assemble and this should be reflected both in the development plans and the development management process, allowing for longer planning permissions and greater floor areas, reflecting that they will be catering for demand beyond 2016.

Level 3 Centres

- 6.18 District and town centres usually comprise groups of shops often containing at least one supermarket or superstore and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as libraries. A supermarket (defined as less than 2,500 sq m net food often with car parking) usually attracts a catchment of approximately 3,000-5,000 people in Ireland, whereas a superstore (defined as more than 2,500 sq m net food usually with car parking) has a larger catchment population of approximately 12,000-15,000 people. As highlighted above, the level of floorspace existing in each centre does vary considerably even if the centres are at the same level in the hierarchy within this context it is important to note that the DoEHLG Retail Planning Guidelines sets a guideline size of approximately 10,000 sq m net and up to 20,000 sq m net where appropriate in the metropolitan area of the GDA³².
- 6.19 It is important where large areas of new housing are planned that new retail centres are provided in tandem with the housing at a scale appropriate to meeting the regular convenience and lower order comparison shopping needs of these new communities. In the interests of sustainable development, therefore, this Strategy recommends that in considering the provision of new district centres, where they are (a) needed, and (b) appropriate and justified from a co-ordinated planning perspective. In granting such developments cognisance should be taken of existing retail in other areas of the County/City but should not necessarily be restricted on the basis that a Council already granted a volume of retail in those other areas in excess of what is proposed as needed in this Strategy, where overall patterns of sustainable travel and community viability are accentuated.

³² Dublin as referred to in the DoEHLG Guidelines is interpreted to mean the metropolitan area for the purposes of this policy.

Neighbourhood/Local Centres and Villages

- 6.20 Larger centres have in the past been the focus for much development and investment and to some extent this should continue to be the case. However, the need for local shops and services is equally important within both urban and rural areas. Planning authorities should seek to protect existing facilities which provide for people's day to day shopping needs and seek to remedy deficiencies to avoid social exclusion and isolation. Encouragement should therefore be given to uses which support the community and help solidify the role of the village/small town as an important local centre such as medical clinics, social services, pharmacies, cafes and post offices.
- 6.21 Small towns and villages should be the main service centres in rural areas, providing a range of facilities, shops and services at a scale appropriate to the needs and size of their catchment areas. They should where possible provide a focus for economic development and rural-based industries, including markets for locally-produced food and other products.
- 6.22 In general for local shopping Councils should:
- Ensure that the importance of shops and services to the local community is taken into account when assessing proposals which would result in their loss to another use;
 - Reflect a positive position for the conversion and extension of shops which are designed to improve their viability.

Retail Formats within the Hierarchy

- 6.23 **Table 6.2** below outlines retail formats expected in each level of the retail hierarchy, which gives guidance on the scale and levels of retail provision within each grade.

	Higher Order Comparison	Middle Order Comparison	Lower Order Comparison	Superstore	Supermarket
Metropolitan Centre	✓	✓	✓	✓	✓
Major Town Centre	✓	✓	✓	✓	✓
Sub-County Town Centre		✓	✓	✓	✓
District Centre		✓	✓	✓	✓
Neighbourhood Centre			✓ ³³		✓

33

33 Such shopping should be limited to a small number of shops meeting local needs



- 6.24 No changes are included in matrix for the review and update from those set out in the 2001 Retail Planning Strategy. However, this matrix is only indicative and a more precise interpretation of the guidelines should be determined in the preparation of all subsequent City, Town and County retail strategies and development plans.
- 6.25 In defining the categories and the types of services expected within each level; a general outline is given below:³⁴
- Metropolitan and Major Town Centre*- full range of all types of retail services from newsagents to specialist shops and boutiques; large 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 40,000 sq.m.

District and Town Centres- These centres will vary both on the scale of provision and the size of catchment, due to proximity to a major 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 types benefiting from lower rents away from larger urban sites, some leisure activities 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 existing major centres, the scale of retail and mixed provision is lower, with the centre/ town range of shops meeting more basic day to day needs and only small scale range of comparison units trading. Such centres/towns would generally range in size from 10-25,000 sq.m. of lettable retail space catering for a population of 10,000- 40,000.

Neighbourhood/Small Town/Village Centre- These centres generally provide for one supermarket or discount foodstore ranging in size from 1,000-2,500 sq.m 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 grouped together to create a focus for the local population.

Local Shops/Small Villages - These shops meet the basic day to day needs of surrounding residents, whether as a 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. 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 - 1,500 sq.m of lettable space.

³⁴ These figures provide a general guideline of the average size of retail in such centres. The maximum and minimum sizes for centres should be set out in the relevant statutory development or local area plan taking into account specific local circumstances and the adopted County/City Retail Strategy

Policy Guidance & Recommendations

Introduction

- 6.26 The delivery of the vision for an integrated retail strategy is critical to achieving viable, sustainable and functional retail facilities for the growing population of the GDA. This delivery manifests itself through the setting and meeting of challenges in each Council area in the form of key policies and objectives within the Development Plan. These focus on supporting the vision and hierarchy outlined above, and through continuing to support current actions resulting from existing policies and plans, which seek to deliver the retail hierarchy and direction of the 2001 Strategy.
- 6.27 In translating the vision into policy perspectives for each Council, key directions are set out below for each planning authority, alongside general recommendations regarding Development Plan content and a framework for co-operation across Council boundaries. This is to ensure policy continuity across Council lines and the achievement of an integrated approach throughout the GDA to retail planning.

Recommendations for Development and Local Area Plans

- 6.28 The City and County Councils should adopt a positive and proactive approach to planning for retail development within their areas. Within their development plans the planning authorities should set out individual retail strategies for the network and hierarchy of centres, including local centres, within their area. This proactive approach should, where necessary extend to using the compulsory purchase powers of Councils to bring forward important sites for retail development.
- 6.29 In preparing their Development Plans, local authorities should:-
- Be cognisant of the need to provide spatially appropriate, sustainable high quality retail;
 - take account of the retail market locally and nationally;
 - be aware of new retail trends, technologies, efficiencies and innovations;
 - take account of the broad forecasts for additional retail floorspace and how the retail sector is likely to want to respond to that demand over the plan period, by reference to location;
 - encourage retail in town centre locations and restrict retail outside of town centre locations;
 - in recognising the role of retail as a key engine in town centre life, encourage the provision of retail along public streets with a mixed use context and requiring high quality urban design- giving legibility and sense of place to neighbourhoods and districts - in proportion to the order of service provided.”
 - identify a range of suitable sites on which the demand for development might best be met, with particular emphasis on the improved public transport links as noted in Transport 21;
 - assess the role and impact of significant proposed expansions of retail in the Plan area, on movement, within the context of a strategic transport assessment which would consider both road capacity and access to public transport,
 - assess the effectiveness of previous development plan policies aimed at enhancing the vitality and viability of individual centres and updating of policies as a result, where necessary;
 - improve access to town centres by facilitating opportunities for public transport, cycling and walking; while also ensuring that sufficient car parking is available for necessary car borne shopping,
 - designate core areas primarily for shopping uses and secondary areas for shopping and other retail service, commercial and residential uses and set out policies for the appropriate management of both types of area;
 - undertake regular health check assessments;
 - include criteria-based policies to provide developers with information on how to present a comprehensive retail case including:-
 - *providing a detailed impact retail assessment of the proposals on existing town centres;*

- demonstrating the proposals are located in the most sequentially preferable locations;
- assess their accessibility by a choice of means of transport

6.30 In terms of the above, in order to ensure inappropriate retail development does not take place, it is suggested that the following three elements are introduced more rigorously as part of the decision making process:-

- impact;
- sequential test;
- development is of an appropriate scale.

Policy Approaches to Differing Retail Formats

Not all retail developments are easily defined and some raise specific issues relating to their particular format or goods sold. Below are recommended policy directions in relation to three of the main differing forms of retail currently operating in the GDA. Councils in preparing their own strategies need to be aware of possible new forms of retail which may emerge and take these into account as part of preparing their Strategies.

Outlet Centres

As described in Chapter 4, this is a specialist centre offering fashion over-runs, often designer label led retailers. One such centre is already operating in Kildare town. The market for these types of centres operates on a regional basis. While these types of retailing draw customers from a wide catchment area, predominantly by car, it is important that future centres developed provide the opportunity for links to attractive public transport modes and facilitate coach connections. In terms of the planning system, the key issues relate to the precise function of the centre and whether such developments would divert trade in similar comparison goods away from either the City Centre or Major and County Town Centres. A detailed retail study will be required as part of any planning application.

Retail Warehousing

Retail warehousing is generally defined as large floorspace stores specialising in the sale and/or display of bulky household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers. Recent years have seen a significant increase in the provision of retail parks where a number of warehouses are grouped together sharing parking arrangements and located on the fringes of built up areas, accessible from ring road or distributor road networks. There are also a number of retail warehouse developments associated with and adjacent to Major Town Centres, or large DIY type stores sited within County Town Centres. Due to the differing impacts, two policy approaches are proposed.

When and where new retail warehouse developments out of centre are proposed, developers should in the application demonstrate why the scheme cannot be located within town centres as part of the sequential test. Developments should generally be located within the built up area, where public transport is available³⁵, if opportunities near or adjacent to the core retail or out-of-centre locations are not viable or available. In order to ensure that this type of retailing does not impact on existing town centres, conditions should be applied to restrict the range of goods to be sold, limit floorspace including mezzanines and restrict subdivision to smaller units where appropriate.

For retail warehouses located within town centres, some level of flexibility could be applied in allowing types of stores where a mix of bulky and non-bulky goods are sold, allow the retail core to expand if (i) the location is easily accessible by foot from the core retail area; (ii) the form of the development is in keeping with good urban design and (iii) the development would not detract from the adopted masterplan/urban centre strategy/local area plan aspirations for the area in question.

³⁵ The possibility of a reduction in parking requirements should be considered in these circumstances.



Discount Convenience Retailers

This form of retailing forms an important part of the convenience market and should be located in highly accessible locations such as neighbourhood, district or town centre(s) (with a suitable provision of public facility fittings to be found therein). The key retail tests, such as justifying need, impact, sequential test and ensuring that the development is of an appropriate scale, should be demonstrated as part of any discount convenience store application (exceeding 1,700 sq.m. gross) where the site is not located in a designated neighbourhood, district or town centre.

Scale

- 6.31 There is in this strategy a general requirement to demonstrate 'need' for any retail development in edge or out of centre locations. In the normal course any additional floorspace should be directed towards improving/extending existing centres where appropriate. This helps maintain the centres' economic, commercial and cultural role.
- 6.32 In terms of scale, local authorities should ensure that the size of retail opportunities identified in development or local area plans are directly related to the role and function of the centre and its catchment. It is vital that new centres and community areas are provided with new adequate retail facilities where choice is available, whether at district or local in size, in the interests of meeting local demand in a sustainable cohesive manner. It is important however that the provision of retail in new growth areas is designed to serve that area and not to erode existing centres by drawing trade from an extended area outside of the new core population.

Council Specific Policy Recommendations

- 6.33 The following recommends specific policy objectives in relation to the individual City and County Councils of the Greater Dublin Area which should form part of the issues addressed in the individual retail strategies adopted by each Council and give direction to future retail growth in each Council area. Also addressed in this section is the need to provide opportunities for co-operation between Councils in addressing the issue of future retail growth. In preparing retail strategies and local or county/city/town plans Councils should assess local centres (level 4 and 5) to assess whether they need to change level and/or zoning policy; to ensure their viability and that they meet the needs of the surrounding community.”

Dublin City Council

- Maintaining the role of the city centre as the main retail centre for comparison goods in the Country through continuing to develop the retail environment, urban design of centres, range of retail uses and quality of the public realm to the highest quality to ensure that the City retail core competes on a national and international scale. As part of this, to continue to facilitate complementary uses to retail, where relevant and suitable, to form mixed use development in highly accessible locations.
- To expand and develop local character areas, reflecting the differences and individual needs of the main retail areas of the city core focusing on facilitating the integration of the economic, cultural and spatial components of the City.
- In the suburban areas, to support the hierarchy of retail locations (district, neighbourhood and local) that serve the requirements of the city population. Within this hierarchy, support of the development and expansion of the functions of the Prime Urban Centres (as locations of employment, retail, community and tertiary services) is centrally important.
- As referred to in paragraph 4.20, Dublin City, with such a large available market contains a significant number of specialist shops, some of which group into districts within the inner city, providing character and attractive destinations. Such specialist activities include art galleries, academic books, musical instruments, furniture and antiques as well as high end designer goods and jewellery all of which require a significant accessible market to remain viable. The City retail strategy needs to actively seek to protect this range of shopping opportunities both to maintain the attractiveness of the city as a destination for shopping.

- Encourage the provision of accessible good quality convenience shopping with strong choice and competition within the inner city area and in the rapidly growing areas in Docklands and Heuston/Liberties to ensure that adequate provision is made for the increased population now living in the City; reducing the numbers travelling to the outer suburbs to meet their convenience shopping needs.

South Dublin County Council

- To develop and consolidate a hierarchy of high quality, vibrant urban centres, supported by the development of a strong retailing sector that serves to enhance and develop the urban fabric of existing and developing centres in accordance with the principles of good urban design and sustainable development.
- To support the County Town of Tallaght with its highly accessible centre and an established and growing catchment population through the intensification and expansion of the town centre area and to facilitate the provision of the highest level and broadest range of retailing in the County, along with a broad range of services and other functions.
- To facilitate the continuing development of the Liffey Valley Centre at Quarryvale as the second major town centre in the County by upgrading the urban form of the town centre area to provide for the development of new streets and civic spaces, and a range of people intensive uses appropriate to a major town centre, (including convenience and comparison retail, commercial, residential, recreational, community and cultural activities) based on high quality urban design. Part of this will facilitate the continuation of a strong retailing sector in this centre to meet the needs of its catchment within South Dublin and support the future vitality and viability of the centre.
- To deliver the new high quality district centres designated in the SDZ at Adamstown and the proposed SDZ at Clonburris to ensure that these areas of new population growth are provided with the necessary retail services in highly accessible locations.

Fingal County Council

- To continue the improvement of the principal major town centres of Blanchardstown and Swords in line with their position in the hierarchy, through incorporating a variety of uses including civic, entertainment, office and residential uses, as well as a high quality range of convenience and comparison retail facilities, served by and supporting the provision of high quality public transport including new rail based public transport (Metro North and Metro West) proposed for both centres under *Transport 21*.
- To facilitate and promote the continued improvement of Balbriggan and Malahide town centres in line with their position in the hierarchy so that they meet their role as key district centres, incorporating a range of convenience and comparison retail facilities adequate to serve the everyday needs of the residents of the towns and their hinterlands, together with a variety of other uses including entertainment, office and residential uses.
- Supporting a good distribution of easily accessible centrally located district centres providing for the local needs of towns such as Donabate, Skerries, Rush, Lusk, Portmarnock, Baldoyle and Howth, and suburbs such as Charlestown, Castleknock and Tyrrelstown, alongside a more intensive distribution of smaller centres catering primarily for local convenience needs.

Dun Laoghaire Rathdown County Council

- To support the future vitality and viability of the main retail centres in the County and to facilitate a competitive and healthy environment for the retail industry of the future, while reinforcing the sustainable development of the County.
- To maintain the two major town centres - Dun Laoghaire and Dundrum - as the primary retail centres in the County. This will be reflected in the nature and scale of retail and services permitted in these centres and by the integration of leisure, entertainment and cultural facilities at both locations.

Support the viability of existing district centres and allow for the redevelopment and rejuvenation of ageing centres, to facilitate changing retail patterns and needs and to move away from single use sites by integrating retail provision at district level with other services, offices and residential to create vibrant centres serving the built up surrounding housing districts

- To facilitate and promote the development of Cherrywood town centre on a phased basis as a large scale urban district centre located within a high density environment subject to the provision of light rail links, a sufficient resident population exceeding 10,000 and the preparation of an approved urban design master plan.
- To encourage the provision and survival and modernisation of local shopping in the many villages and suburban locations across the County to allow day to day shopping to be met within walking distance through the protection of the retail opportunities in key local locations.

Wicklow County Council

- To promote the development of strong high quality expanded comparison floorspace in the metropolitan and major town centres to address the high levels of leakage of retail expenditure from these centres and radically reduce the quantity and length of private car journeys for retail purposes.
- To support the development of strong expanded retail provision within Wicklow County so that the quality and range of retail comparison, bulky goods and convenience shopping are developed and expanded to facilitate an active competitive and sustainable retail market in the County.
- To promote and encourage major enhancement and expansion of retail floorspace and town centre activities including linked leisure and other commercial activity within Bray town centre to sustain its competitiveness as a major town centre.
- To facilitate and encourage the major expansion of Wicklow town centre retail provision and quality and to enhance its role and importance as a County town centre in the GDA to meet the needs of both the town population and surrounding rural districts.
- To facilitate and encourage the consolidation and improvement of retailing and other town centre activities of the Level 3 centres of Arklow and Greystones and to ensure that there is an equitable, efficient, competitive and sustainable distribution of retail floorspace in the towns.
- To consolidate the retail status of Blessington and Baltinglass to ensure they can adapt to continue to service their extensive rural hinterlands.

Kildare County Council

- To promote and encourage the enhancement and expansion of retail floorspace in the County Town of Naas to reflect its role as a major town centre and the significant population growth experienced in the past decade and to create a thriving active town centre.
- To support the attractiveness and viability of the key linked towns of Newbridge and Kilcullen, which form along with Naas a 'Primary Dynamic Cluster' in the RPGs, and to encourage the regeneration of land and buildings in the town centres to provide opportunities for further mixed use developments; and to enhance the vibrancy of the town centres.
- To seek to provide quality opportunities for comparison and convenience retail shopping in the North East Kildare area, specifically in the towns of Leixlip, Maynooth, Kilcock and Celbridge; including the expansion of Leixlip into the Collinstown area as a key site to meet the future needs for comparison shopping in this area. Future development at west Leixlip/Collinstown should be associated with the opening of a new train station to link Maynooth and Kilcock centres to the area and provision of the opportunity for the development of a new

community incorporating a range of uses including leisure, amenity, community, cultural, retail, employment and residential, developed over a extended phasing arrangement to ensure sustainable integrated planning.

- To promote the role of Athy as key town serving the large rural hinterland of South Kildare seeking to create a critical mass within the urban core so that the retail opportunities in the town centre are developed to create a viable, attractive local destination for convenience and some comparison shopping and thus reduce market leakage from this area.
- To continue to promote key local towns including, inter alia, Kildare, Kilcullen, Clane and Monasterevin as attractive locations for convenience and local comparison shopping to meet the needs of these growing towns and surrounding rural communities on a day-to-day level.

Meath County Council

- To accord with its role as a major centre within the GDA hierarchy, to continue to support and develop the County Town of Navan as a predominantly comparison shopping based centre with a range of quality convenience forming an important element in the overall role and attraction of the town. This continuing development of Navan as a key destination will require flexibility in bringing forward key sites within the town core area. It will also necessitate encouragement of the provision of high quality retail units to provide for the needs of modern retailers and to facilitate the provision of a good mix of offer to the local and surrounding population.
- The promotion of policies to take advantage of the potential of Navan town centre for greater intensification of development within the existing fabric and on opportunity sites and through the redevelopment of the central car parking areas. This will ensure that retail and other town centre uses are retained within the town centre rather than dissipated to more peripheral areas, thus avoiding the possibility of displacement of the prime shopping focus from the existing core retail area.
- To facilitate and promote the continued improvement of Dunboyne, Ashbourne, Dunshaughlin, Kells, Laytown/Bettystown, Enfield and Trim in line with their position in the hierarchy so that they meet their role as Level 3 centres, incorporating a range of convenience and comparison retail facilities adequate to serve the everyday needs of the catchment population. To provide for the future development of Dunboyne from Level 3 to a Level 2 centre over a 15-20 year time frame alongside the development of the rail line and associated future population growth, with this growth guided by the the Integrated Framework Plan for Landuse and Transportation Plan and the Local Area Plan for Dunboyne.

Co-operation across Council Boundaries

- 6.34 One of the implications of seeking to deliver an integrated approach to retail development in the GDA is the need to facilitate and integrate into the planning framework greater opportunities for cross-boundary co-operation. Retail catchment areas by their nature cross Council boundaries and developments in one local authority area can have a significant impact on the shopping patterns of an adjoining Council. As part of the overall co-ordinated approach sought by this strategy, it is essential that each Council incorporates a set of principles of co-operation and consultation regarding the impact of retail plans or schemes into the City or County Development Plans and/or Retail Strategies.
- 6.35 In the instance where a draft local area plan/framework plan or other forward planning scheme is prepared and proposes to provide for significant retail floorspace, greater cooperation across Council boundaries will be necessary at draft stage, where impacts are significant to the retail hierarchy or to retail areas in adjoining Councils.



- 6.36 If a plan concerns an area which:
- (i) is located proximate to a Council boundary and/or;
 - (ii) where due to the scale of retail proposed in the plan, the catchment for the development extends into adjoining Council areas, the authority preparing the plan shall notify the Council affected by the plan and provide the opportunity for consultation and discussion on the impact that the retail element may have on retail provision and travel patterns in the adjoining Council area.
- 6.37 For planning applications for retail development when the application exceeds 5,000 sq m (gross) retail *and* either:
- (i) the retail impact assessments prepared for a development show the catchment area of the scheme and/or the towns/centres impacted upon by the proposed scheme extending into the adjoining Council areas; or
 - (ii) the application is sited outside any of the designated hierarchy towns in the Regional or County Retail strategies;
- Copies of the application should be referred to the affected adjoining Councils the Regional Authority and the RPG office within a week of the application being received to allow the opportunity to make a submission.
- 6.38 Such large scale applications could have significant impacts on retail spending patterns and such co-operation across Councils will allow for proposals to be considered fully. By facilitating the input of adjoining Councils through submissions on an application, the impact of new schemes will be assessed based on retail locations and policies in adjoining Councils as well as within the Planning Authority.

Retail Development Management

Assessing Proposed Developments

Introduction

- 6.39 The development management process is fundamental to delivering a successful retail strategy. The failure at this stage to fully examine the issues highlighted and recommendations will result in the revised retail strategy having little meaning except at a very general level. For this strategy to have a real impact, it is important that each Council in exercising its powers in deciding on planning applications take into consideration the impact of the development, and of the impact of cumulative developments on retail sector both within their own Council and on adjoining Councils and the GDA as a whole.
- 6.40 Depending on floorspace required and in consideration of existing retail stock and pipeline permissions the case for new centres will need to be made as much if not more on a qualitative rather than a quantitative basis.. One of the recommendations from this Strategy, is therefore, that the assessment process for most applications located within the core retail areas within Level 1 or 2 centres should focus on the qualitative aspects of the proposals (as well as other keys issues such as access and the appropriateness of the proposed development structure). It would not necessarily be required to demonstrate the quantitative need for retail proposals where the proposal is located within the existing defined town centres/retail cores zoned in Development Plans, except where the scale of the application warrants such consideration. Quantitative need and a sequential test should, however, be necessary for any retail development application of a reasonable size which is in an edge of or out of centre location and/or not in accordance with the adopted Development Plan. (see below for detail on thresholds.)
- 6.41 All retail applications of a reasonable size should address the issue of qualitative need/benefits as regards their scheme. Qualitative need is usually defined as a sectoral or geographical gap in the distribution of facilities or deficiencies in the quality of provision. Issues relating to the range of products being sold, product quality and price and the overall quality of the shopping environment are all issues to be taken into consideration.
- 6.42 In preparing the qualitative case developers should:-
- demonstrate that an appropriate distribution of locations is achieved, subject to the key objectives of promoting the vitality and viability of town centres and the application of the sequential approach, to improve the accessibility for the benefit of whole community,
 - ensure provision is made by the local planning authority for a range of sites which genuinely allow choice to meet the needs of the whole community, particularly those living in deprived areas, and
 - ensure that retail impacts are addressed in detail as part of this process.
- 6.43 Additional benefits in respect of regeneration and employment do not constitute indicators for need for additional floorspace. However, they may form a material consideration in the site selection process. The weight to be given to such factors will depend on particular local circumstances.

Impact

- 6.44 If additional sites come available as either extensions or enhancements to existing town centres, then careful consideration should be given to the potential impact of the proposals on existing centres.
- 6.45 Impact is not necessarily about measuring negative results. Improving existing centres can often have a positive impact as development in a well connected town centre could result in a number of increased linked trips which may clawback expenditure currently being lost to competing centres.
- 6.46 However, where the potential development of a site will significantly improve the attraction of a centre, the impact on that centre and other nearby centres will need to be addressed as part of the application. This can take the form of either a qualitative assessment of the impact of the scheme or, where the proposal exceeds a certain size and is located outside certain level centres in the hierarchy, will involve a full retail impact assessment addressing both the qualitative and the quantitative impact. (see below for details of thresholds).

- 6.47 A key part of assessing the impact of a new retail development is addressing the transport impacts that the new retail will cause. Traffic Impact assessment plans should accompany an application for a centre where retail impact assessment is required. Such plans should incorporate solutions which support the role of public transport, provide delivery options, do not undermine core urban design principles or strategic routes and proactively manage private transport with inbuilt review mechanisms

Sequential Test

- 6.48 In assessing retail applications the sequential test should be applied more stringently. The level of information currently provided on the sequential test varies from application to application. In some cases it is no more than a short comment in applications.
- 6.49 To clarify, in accordance with the RPGs requirements, all applications for significant retail development should be assessed against a range of criteria including the sequential approach.
- 6.50 All options in a centre (including, where necessary, the extension of a centre) should be assessed before less central sites are considered for development for retail uses.
- 6.51 In taking forward the strategy and incorporating it into the Development Plans, planning authorities are encouraged to work with stakeholders to identify a range of sites to meet the improvements needed over the plan period. In order to facilitate effective town centre development, flexibility and realism is required from both local planning authorities and developers.
- 6.52 In planning terms, developers and operators should be able to demonstrate that in seeking to find a site in or on the edge of an existing centre they have been flexible about their proposed business model in terms of the following planning considerations:
- The scale of their development;
 - The format of their development;
 - Car parking provision; and
 - The scope for disaggregation.
- 6.53 In seeking to demonstrate flexibility, developers and operators should consider the scale, reducing the floorspace proposed, more innovative site layouts and store configuration, such as multi-storey developments with a smaller footprint. Reduced or re-configured car parking should also be a priority, especially in areas which are easily accessible by public transport.
- 6.54 It is not sufficient for an applicant to claim merely that the class of goods proposed cannot be sold from the town centre. However, it is not the intention of the sequential test policy to seek arbitrary sub-division and it should not be used as such. It is rather to ensure that consideration is given as to whether there are elements which could reasonably and successfully be located on a separate sequentially preferable site.
- 6.55 Applicants should provide clear evidence to demonstrate why such sites are not appropriate in terms of:
- Availability: the sites are unavailable and are unlikely to become available for development within a reasonable period of time (to be agreed with or defined by the local authority).
 - Suitability: sites are not suitable for the type of development proposed;
 - Vitality: the development would not be viable on these sites.
- 6.56 A thorough sequential test is essential for future retail applications where the proposed development is in excess of 2,000 sq m (gross) of new retail floorspace and is located outside of the zoned town/district/village core commercial area within a designated retail centre (i.e. Centres identified as Level 1,2,3 or 4 in the adopted County or City retail strategy).

Retail Impact Assessments

- 6.57 Approaches to assessing retail impact have changed considerably over recent decades because of technical advances in planners' understanding of the retail system and through learning from past experience of the effects of new retail developments. This Strategy recommends that short guidance notes should be prepared by the Regional Planning Guidelines Office with the Regional Authorities and the Planning Authorities of the GDA on best practice methodologies for sequential tests and retail impact assessments to assist practitioners and Councils in preparing and assessing applications for developments featuring a large element of retail, during the life of this Strategy.
- 6.58 A variety of approaches have been developed over the years to assess retail impact. However, in assessing the impact, planning authorities should consider the impact of the development on the centre or centres likely to be affected, taking account of:
- the extent to which the development would put at risk the planning strategy for the area and the strategy for a particular centre or network of centres, or alter its role in the hierarchy of centres,
 - the likely effect on future public or private sector investment needed to safeguard the vitality and viability of the centre or centres,
 - and detailing the likely impacts (quantitative and qualitative) of the proposed development on trade/turnover and on the vitality and viability of existing centres within the catchment area of the proposed development and, where applicable, on the rural economy (an example of a positive impact might be if development results in clawback expenditure from the surrounding area),
 - changes to the range of services provided by centres that could be affected,
 - likely impact on a number of vacant properties in the primary shopping area,
 - potential changes to the quality, attractiveness, physical condition and character of the centre or centres and to its role in the economic and social life of the community, and
 - (where relevant) the implications of proposed leisure and entertainment uses for the evening and night time economy of the centre.
- 6.59 The level of detail provided in a retail impact assessment should be proportionate to the scale and nature of the application.
- 6.60 In order to enable a full assessment to be made of the impact of new retail developments on existing town centres and shopping patterns, the Department of Environment, Heritage & Local Government Retail Planning Guidelines recommend that applicants conduct a retail impact assessment of their proposal where the local authorities consider the application to be of a large scale. For the purposes of the GDA, this strategy sets out a guideline regarding when retail impact assessments should normally accompany an application which contains a retail element.
- 6.61 Retail impact assessments should normally accompany an application where:
- (i) the development is located in a Level 1 or 2 centre and when complete would increase the retail floorspace of the centre/town by 5,000 sq.m (gross)
 - (ii) the development is located within a Level 3 or other centre, or outside a centre; where the scheme if completed, would result in an increase of over 2,500 sq m gross floor area;
- 6.62 These suggested thresholds do not preclude the local authority specifying at pre-planning stage that particular development below such thresholds should include a retail impact assessment and requesting such an assessment as additional information on a planning application where they perceive local circumstances require an assessment to be done.



Use of Planning Conditions

- 6.63 The effective use of planning conditions is becoming increasingly important to manage how retailers operate in terms of the types of goods which could be sold, and the impact of sub-division and the installation of mezzanine floors.
- 6.64 Certain basic criteria have been suggested as a guide to deciding whether or not to impose a condition (*Development Management: Guidelines for Planning Authorities*, June 2007). These consider whether or not a condition is:
- Necessary
 - Relevant to Planning
 - Relevant to the development to be permitted
 - Enforceable
 - Precise
 - Reasonable
- 6.65 As the retail market growth is expected to slow down over the next few years, it is critical to ensure that quality retail comparison shopping is maintained within the town centres identified for this purpose. To achieve this, the strategy recommends that conditions are applied particularly to permissions for retail warehousing developments to avoid non-bulky goods, such as clothing, trading in out of centre locations. It is recognised that the case presented to Councils for allowing certain retailers into bulky goods use locations can pose difficulties in assessing suitability. For this reason it is recommended that a cautionary approach is adopted to such decisions. Therefore, for the GDA it is suggested that the following conditions are placed on all retail applications in edge or out of centre locations to avoid impact on existing town centres:
- Restrictions on range of goods (i.e. specify types of goods to be sold);
 - Restriction on floorspace (i.e. sales area shall not exceed...);
 - Prevent sub-division into a larger number of smaller shops;
 - A separate condition should also be included on the installations on mezzanines. A full cover mezzanine can in some instances double the floorspace of a unit and can have a considerable impact on existing town centres;
 - Restriction on delivery hours in residential areas.
- 6.66 This will help facilitate a regulated well managed retail environment which, if applied correctly, helps to minimise the impact on town centres and ensures that the character of a development cannot subsequently be changed to create a form of development that the planning authority would originally have refused.

