Proposed Amendments to the Draft Meath County Development Plan 2013 - 2019

APPENDIX 5:

RETAIL STRATEGY

October 2012

CHAPTER 1 - INTRODUCTION

1.1 Introduction

1.1.1 The Retail Planning Guidelines (RPG's) for Planning Authorities (2012~~05~~), issued by the Department of the Environment~~ and Local Government (DoELG~~, Community and Local Government~~)~~, require Local Authorities to prepare retail strategies and policies for their areas and to incorporate these where appropriate into their development plan. In 2003, DTZ Pieda prepared a Retail Strategy for County Meath.

1.1.2 Meath County Council are currently reviewing the Meath County Development Plan 2013 - 2019. The review is considered particularly pertinent considering the growth in population and increased demand for retail services that the County has experienced since the preparation of the previous strategy in 2003. Furthermore, the Retail Strategy for the Greater Dublin Region which includes County Meath was published in 2008. This document provides guidance and policies for retail development at a strategic level and aims to ensure a co-ordinated, sustainable approach to the assessment and provision of retail development in the GDA.

1.1.3 The document sets out a retail hierarchy for the GDA and sets out a series of principles and recommendations for each Council. The principle of a hierarchy of retail centres informs the consideration of zoning for retail developments in development plans and is an essential component of a retail strategy. The review of the 2003 Retail Strategy is necessary in this context.

1.1.4 It was considered that the time was opportune to review the County Retail Strategy in tandem with the preparation of the new County Development Plan. It is envisaged that the retail strategy will form an integral part of Meath Local Authorities overall vision for the development of County Meath over the period of the plan. It will inform the policies of the plan in respect of retail development and ensure that such policies are based on the most up to date information.

1.1.5 The strategy provides advice regarding the broad quantum, scale and type of retail development required in Co. Meath. The strategy involves both desk top and field work surveys including a review of existing published documents, studies, plans, retail legislation, government policy, local studies as well as analysis of current retail trends, internationally and locally and a review of best practice in the sector as applicable in both a national and local context. Field surveys comprising the availability and quality of retail floorspace, extent of shopping catchment area, available product range, public satisfaction levels, expectations, perceived gaps and desired additions were also undertaken.

1.1.6 Having regard to the retail hierarchy contained in the GDA Retail Strategy, this Strategy will examine in detail the key towns in County Meath included i~~o~~n the GDA retail hierarchy, namely Navan, Kells, Trim, Dunboyne, Dunshaughlin, Ashbourne, Laytown / Bettystown and Enfield. Smaller towns and villages are also examined in order to provide an understanding of the role and function of such towns and villages.

1.2 The Purpose of the Retail Strategy

1.2.1 The purpose of the retail strategy is to implement the objectives of the Retail Planning Guidelines. Cognisance was also taken of the County Meath specific policy recommendations set out in the Retail Strategy for the Greater Dublin Area 2008 – 2016.

1.2.2 The retail strategy considers in particular the following:

- Confirmation of the retail hierarchy, the role of centres and the size of the main centres in the County.
- Definition of the boundaries of the core shopping area (town centre area) and edge of centre areas for the key towns of Navan, Dunboyne, Kells, Trim, Ashbourne, Laytown/Bettystown, Enfield and Dunshaughlin with mapping to illustrate same provided.
- An assessment of the requirement for additional retail floorspace.
- Strategic guidance on the location and scale of retail development.
- Preparation of polices and action initiatives to encourage the improvement of town centres.
- New and emerging retail trends, best land use planning practice and changes in national policy and market shifts.
- Household and shoppers surveys.
- Population growth based on the 2011 Census (preliminary results) and predicted trends set out in the Regional Planning Guidelines for the Greater Dublin Area.
- The impact of major retail development in competing centres.
- Consultation with key stakeholders and adjacent local authorities.
- Identification of criteria for the assessment of retail developments.
- Health check assessments for the key towns.
- Analysis and review of the Meath County Retail Strategy 2003 and using that study and the Retail Strategy for the Greater Dublin Area 2008 – 2016 as a baseline, update and analyse the current situation and available information on the retail sector within the county including retail spend, leakages, floorspace quantum and~~,~~ vacancy rates for the key towns.
- Quantifying the anticipated need if any for additional floorspace requirements within the county for the key towns having regard to the anticipated population growth within the county up to the years 2016 and 2022.
- Identifying the strengths, weaknesses, opportunities and threats to the retail sector with the county, focussing primarily on the key towns and

proposing strategies to capitalise on strengths and opportunities while minimising or removing identified threats and weaknesses.

- Devise policies aimed at promoting retail developments that are easily accessible, particularly by public transport, and avoiding locations based solely on single purpose car journeys.

- Identifying the extent and causes of trade leakages to other centres outside the county and make recommendations that will seek to reduce and/or eliminate these leakages.

- Identifying the extent of the retail catchment area, including existing and potential population of these, for the key towns.

- Making recommendations on policy and actions required to address changing trends in retailing as they might affect the towns of County Meath.

- Making recommendations on policy and actions aimed at preserving existing independent retailers within the core town centre areas.

- Recommendations for additional and/or revised policies and actions aimed at encouraging retail developments while protecting town centre areas.

1.3 Approach

1.3.1 The approach taken in the formation of the review of the retail strategy, undertaken between November 2011 and January 2012 included the undertaking of baseline survey and research. This comprised the following components:

Policy Analysis: National, regional and local policies were reviewed in the context of the retail strategy with particular reference to the retail hierarchy and existing and emerging development plan policies.

Retail Trends: A review of recent retail trends was carried out and an assessment made of their impact and influence on the retail profile and function of Meath.

Economic Context: Retail expenditure is influenced by the economic performance of the County. The economic context for the analysis was therefore established.

Retail Hierarchy and Identification of Core Retail Areas: The structure and context of each town was analysed to determine the core retail area~~s and growth of core retail areas,~~ and to identify the hierarchical retail structure of the principal towns in the County.

Survey: The existing 2003 floorspace study was updated. A household survey was undertaken to establish the existing shopping patterns in the County. This also provided clarity on the extent of leakage to other competing centres and highlighted shoppers concerns regarding the quality and quantum of existing retail floorspace. A shopper’s survey was also undertaken in the principle towns in the County to ascertain consumer’s opinions on the quality of the retail offer of the town.

Qualitative Survey: A qualitative health check survey was carried out in order to assess the current level of vitality and viability of the key centres in the County – Navan, Dunboyne, Kells, Trim, Ashbourne, Laytown/Bettystown, Enfield and Dunshaughlin to assess their strengths and weaknesses in retail terms. Opportunity sites for retail development and expansion were also identified.

Analysis of Competing Centres: Major competing centres including Dublin City Centre, Blanchardstown, Liffey Valley, Swords and Drogheda were assessed to identify their retail offer and roles in the context of Co. Meath.

Quantitative Analysis: Population analysis, expenditure analysis, turnover analysis and overall analysis has been carried out.

1.4 Preparation of Retail Strategy

1.4.1 The qualitative and quantitative analysis and other inputs as outlined above are fundamental in the capacity assessment of the County's need for future convenience and comparison floor space. In brief, the assessment comprises the following principal elements:

(i) Population forecasts.
(ii) Forecasts of convenience and comparison expenditure for 2013-2019 and 2019-2022.
(iii) Establishing the extent of existing floor space and its turnover.
(iv) Analysing the above data to determine the potential convenience and comparison spend available to support new retail floor space to 2022.

1.4.2 The final component of the study is to determine the retail strategy for County Meath to 2022. The factors influencing this include:

- Retail hierarchy.
- Population size and distribution.
- Sequential test.
- Nature of retail provision and need – convenience, comparison and retail warehousing.
- The shopping environment and mechanisms to enhance the vitality and viability of town centres.
- The need to sustain and enhance Meath's regional role and prevent unnecessary leakage of expenditure to competing centres.
- Recognition of the predominantly rural nature of the County and the need to ensure the strategy served all sectors of the community in a way, which is efficient, equitable and sustainable.
- Opportunities to attract shopping to the County.

1.5 Structure of the Report

1.5.1 The remainder of the report is structured as follows:

Section 2 **Planning Policy Analysis**

Section 3 **Economic Context and Current Retail Trends**

CHAPTER 2 – POLICY ANALYSIS

2.1 Introduction

2.1.1 The purpose of this chapter is to review the relevant spatial and sectoral policy documents which will influence the future development of the retail sector in the County. The purpose of this chapter is to highlight the principal documents guiding the development of retailing in the County.

2.1.2 In this section, we identify the current and emerging plans, policies and proposals that are relevant to the review of Retail Strategy in the following order:

- National;
- Regional; and
- County and Local.

2.2 National Level

2.2.1 A number of national level plans, strategies and guidelines are of particular relevance to the shape and direction of the Strategy. These are:

- National Spatial Strategy 2002-2020;
- Sustainable Development: A Strategy for Ireland;
- ~~Transport 21;~~
- ~~Draft~~ Greater Dublin Area Draft Transport Strategy 2011 -2030
- ~~Retail Planning Guidelines for Planning Authorities;~~
- ~~Draft~~ Retail Planning Guidelines for Planning Authorities (2012~~1~~)
- Retail Design Manual (April 2012)
- Development Plan Guidelines for Planning Authorities (2007)
- Smarter Travel – A Sustainable Transport Future – A New Transport Policy for Ireland
- ~~Smarter Travel – A Sustainable Transport Future – A New Transport Policy for Ireland 2009 – 2020.~~

National Spatial Strategy 2002-2020

2.2.2 The National Spatial Strategy (NSS) was published on 28th November 2002. The NSS provides a broad planning framework for the location of development in Ireland over the next 20 years. The key objective of the National Spatial Strategy is the achievement of more balanced regional development.

2.2.3 The strategy examines the growth patterns of the various regions in the country and provides guidance on the future direction of this growth. It also identifies potential development patterns for different areas and sets out overall policies for creating the conditions necessary to influence the location of different types of development in the future.

2.2.4 County Meath is located within the Dublin and Mid-East Area as identified in the NSS (see figure overleaf). There are no gateways or hubs identified in County Meath. The Dundalk gateway to the north, the Dublin City gateway to the south and the triangle gateway of Mullingar, Tullamore and Westmeath to the west surround the County.

2.2.5 Navan is identified as the County Town and as a primary development centre. The NSS suggests that primary development centres need to aim at a population level that supports self sustaining growth but which does not undermine the promotion of critical mass in other regions. It is stated that:

"This suggests an ultimate population horizon of up to 40,000 people for the primary development centres".

2.2.6 The NSS also identifies that Kells and Trim have urban strengthening capacity and states that *"these towns, located on important economic and transport corridors or in important locations and with a capacity to grow, must become a focus for the settlement policies of local authorities as incorporated in county development plans".*

2.2.7 Duleek, Dunboyne, Kells, Trim and the Laytown / Bettystown / Mornington conurbation are all identified as settlements having a population of between 1,500 and 5,000. With regard to these towns it is stated that:

"Towns of this scale in the GDA are also generally located on or near the transportation corridors radiating from Dublin and are relatively close to the larger urban areas. While the primary development centres will be the main focus for responding to future growth in the GDA hinterland, these smaller towns cater for local growth in residential, employment and service functions through enhancing the built environment, water services, public transport links and capacity for development in these centres. Accommodating such additional functions must however be balanced with protecting the character and quality of these towns".

2.2.8 Ashbourne is identified as a town with a population in excess of 5,000.

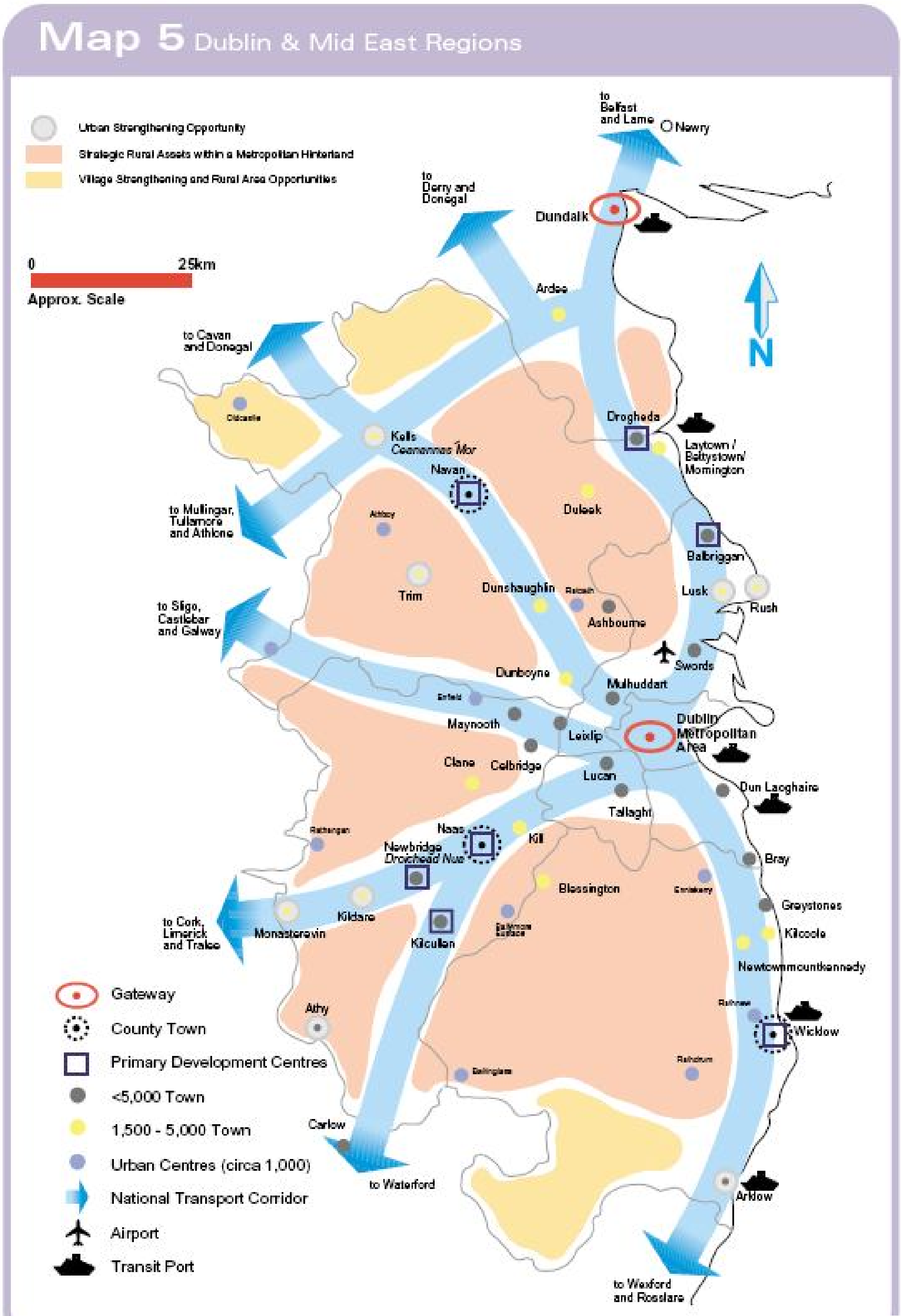

Figure 2.1: Map 5 from the National Spatial Strategy

Sustainable Development: A Strategy for Ireland

2.2.9 The Sustainable Development: A Strategy for Ireland document was published in 1997 with the principal aim of providing a:

"Comprehensive analysis and framework which will allow sustainable development to be taken forward more systematically in Ireland."

2.2.10 It is noted in the strategy that land use planning can contribute to sustainable development by encouraging efficiency in the use of energy, transport and natural resources through careful location of residential, commercial and industrial development, the efficient use of existing developed areas, protection and enhancement of the natural environment and ensuring that new development needs are accommodated in an environmentally sustainable and sensitive manner.

2.2.11 Retail development can contribute to the drive for more sustainable development through the appropriate development of new retail services, e.g. at a scale and location which serves to reduce the need to travel, will fulfil the social requirements of the community and will represent efficient land use practice.

~~Transport 21~~

~~2.2.12 The Transport 21 Programme was launched in November 2005 and contains the plans for the capital investment in the national transportation system for the 10 year period to 2015. The Transport 21 Programme has two separate strands: A Greater Dublin Area Programme and a National Program. For the latter, the focus is on the national roads network, public transport network, and improved regional and local public transport.~~

~~2.2.13 The delivery of the Transport 21 programme, particularly as it relates to public transport, has been adversely impacted upon by the economic recession and the programme as it relates to the Greater Dublin Area will be replaced by the NTA's Greater Dublin Area Transport Strategy, when adopted (see below).~~

Greater Dublin Area Draft Transport Strategy 2011 - 2030

~~2.2.14~~2.2.12 This document has been prepared by the National Transport Authority and was published in draft format in June 2011.

~~2.2.15~~2.2.13 The Draft Strategy vision for the Greater Dublin Area in 2030 is for *"a competitive, sustainable city-region with a good quality of life for all."*

~~2.2.16~~2.2.14 It is described that the Strategy represents the overall strategic approach to developing transport within the GDA for the period up to 2030, and, by its nature, must take a high level approach in many of its recommendations.

~~2.2.17~~2.2.15 The five overarching objectives for the Strategy to support this vision are:

- *Objective 1:*
  Build and Strengthen C~~c~~ommunities

- *Objective 2:*
  Improve Economic Competitiveness

- *Objective 3:*
  Improve the Built Environment

- *Objective 4:*
  Respect and Sustain the Natural Environment

- *Objective 5:*
  Reduce Personal Stress

~~2.2.18~~2.2.16 Chapters 7 to 11 list some 84 different measures (and many of those with several sub-measures) that form the basis of the Strategy. The scale and scope of these measures range from providing major new elements of transport infrastructure to making small scale improvements to existing services. Set out below is an overview of the key elements and measures of the Draft Strategy as it is relevant to the preparation of the Retail Strategy.

~~2.2.19~~2.2.17 The Draft Strategy sets out a three tier settlement hierarchy, linked to the RPG settlement categorisation. The three categories are Dublin City, Designated Towns and Designated Districts and these are indicated on Figure 8.2 of the Draft Strategy.

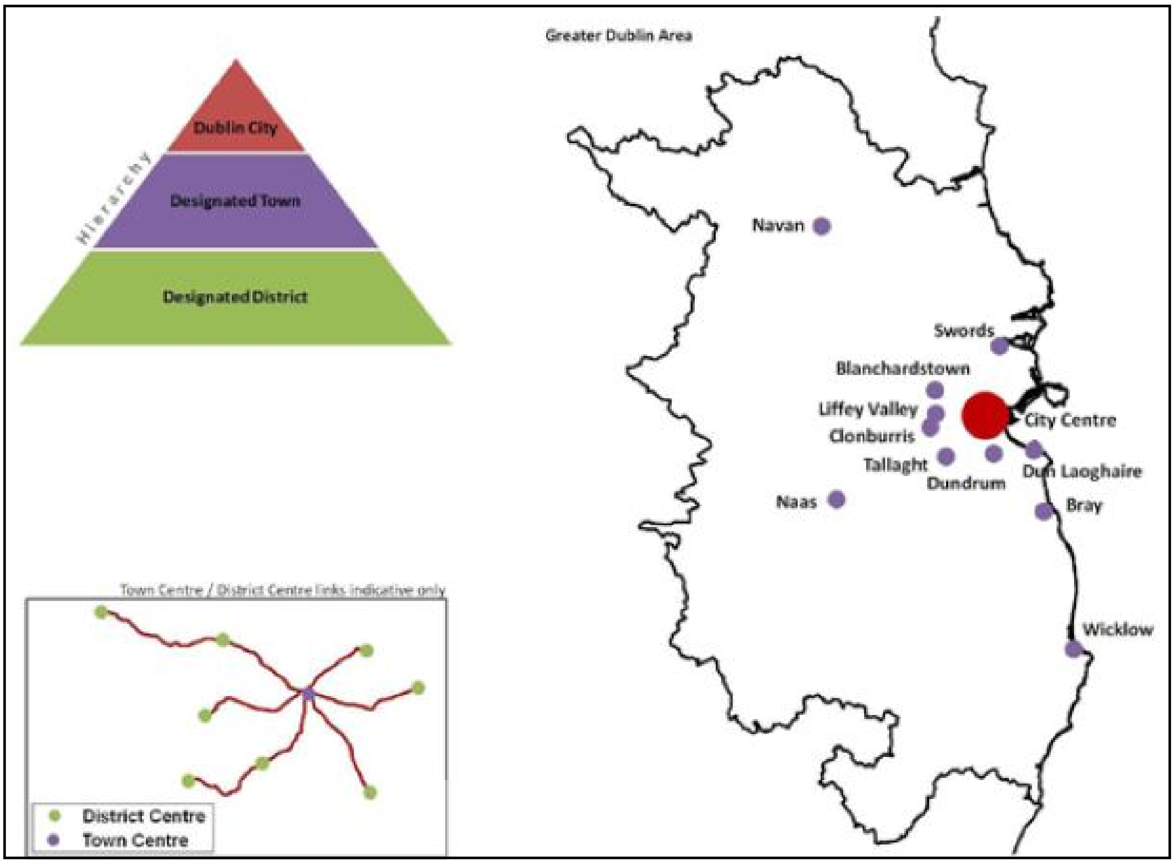

Figure 2.2: Extract from Figure 8.2 of the GDA Draft Transport Strategy S~~s~~howing Classifications of Designated Centres

~~2.2.20~~2.2.18 As can be seen from Figure 8.2 of the Draft Strategy, Navan is the only town in Meath in this hierarchy and is identified as a 'designated town'.

~~2.2.21~~2.2.19 With regard to these classifications, it is explained at Chapter 8, Pages 3 and 5 that:

- Dublin City is at the apex of the hierarchy with a service function for all of the Greater Dublin Area. The future scale and intensity of development in Dublin City must match the level of transport infrastructure investment and services planned to serve it.

- Designated Towns in this Strategy correspond closely to the Metropolitan Consolidation Towns and larger Hinterland towns (Large Growth Towns 1) defined in the RPGs. A Designated Town typically has a core business area or commercial centre which consists of employment, retail, and other services.

- The lower category of Designated Districts, are towns, villages and suburban areas of varying scale and function and include the Large Growth Towns 2 and Moderate Sustainable Growth Towns designated in the RPGs. A Designated District centre will primarily be defined by a traditional urban core, although some may be focussed on a medium sized shopping centre.

~~2.2.22~~2.2.20 Measure LU1 states that:

The Authority, in relation to the settlement hierarchy in the GDA, will seek to:

- *Focus person-trip intensive development, particularly key destinations such as retail and offices, into Dublin City and Designated Town centres within the GDA; and*
- *Focus person-trip intensive development outside Dublin City and Designated Town centres to locations served by stations on the existing and proposed rail network (particularly Metro and DART).*

~~2.2.23~~2.2.21 The Draft Strategy describes that Navan is the only Designated Town in the Hinterland that does not currently have a rail service to Dublin ~~c~~city ~~c~~centre. Its population is forecast to grow substantially over the Strategy period and demand for travel to Dublin is likely to increase in line with this growth. A new rail line linking Navan to Dublin city centre would support regional planning objectives and facilitate Navan's sustainable development.

~~2.2.24~~2.2.22 In this regard, Measure RAIL 4 states that the authority will seek, *inter alia*:

"The provision of a new rail line from Navan to join the recently constructed spur to Dunboyne and Pace, for onward travel to Dublin city centre. The timing of this line construction and the roll out of services will be subject to economic assessment and the timing and scale of development in the Navan area".

~~2.2.25~~2.2.23 Measure LU2 sets out a range of criteria that Development Plans and Local Area Plans should ensure, including *inter alia*:

- *"Local services such as convenience stores, doctors' surgeries and schools are located and provided in a manner which ensures that access for the local community by walking and cycling is direct, safe and convenient.*

- *The re-development of brownfield (previously developed) sites close to existing or proposed public transport corridors are supported.*

- *Guidance contained in the DoEHLG "Sustainable Residential Development in Urban Areas, "Best Practice Urban Design Manual" and the DoEHLG/DoT "Manual for Streets" is adhered to"*

~~2.2.26~~2.2.24 Measure LU3 also sets out a further range of criteria that Development Plans and Local Area Plans should ensure, including *inter alia*:

- *"There is a sequential approach to development whereby lands which are most accessible by public transport are prioritised for growth;*
- *Growth in other areas will be limited to that which cannot be accommodated elsewhere in terms of spatial or social characteristics;*
- *Densities will be increased in order to support public transport, walking and cycling;*
- *Mixed use development will be the primary pattern of growth in all areas:*
    - o *In Dublin City, Designated Town C~~c~~entres and in areas around rail interchange points there will be a greater emphasis on commercial development; and*
    - o *Development around other rail stations will be predominantly residential with local level commercial activities provided".*

~~**Retail Planning Guidelines (2005)**~~

~~2.2.27 The Retail Planning Guidelines provide national level policy guidance in relation to retailing. The guidelines provide clear objectives for retail policy, set out guidance in relation to specific retail formats and issues advice in relation to the location of new retail development. The guidelines represent a plan led approach to retail development at a national level, which is then followed on by the use of county and city retail strategies to guide development at a localised level. The guidelines define five key objectives. These may be summarised 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 – 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.~~
- ~~A presumption against large retail centres located adjacent or close to existing new or planned national road/motorways.~~

~~*Sequential Test*~~

~~2.2.28 One of the key features of the guidelines is the introduction of the sequential test approach in relation to assessing retail applications, with the focus on town/city centres as the preferred location for new retail development. Where there are no town/city centre sites available, the next preferred option is edge of centre sites. Out of centre sites should only be considered where there are no town/city centre or edge of centre sites available or where satisfactory transport accessibility realistically cannot be ensured within a reasonable period of time.~~

~~*Retail Hierarchy*~~

~~2.2.29 The guidelines also set out the principle of the retail hierarchy. The primacy of Dublin is recognised. Within each county, retailing also follows a hierarchical pattern from town centre, district centre, local centre and village centre. The principle of a hierarchy of retail centres is an integral part of a retail strategy as it is a general principle that retail development will be promoted and existing provision enhanced within existing centres.~~

~~*The Role of Town Centres*~~

~~2.2.30 The guidelines recognise that town centres, together with district and major village centres serving rural areas provide a broad range of facilities and services and act as a focus for the local community.~~

~~2.2.31 The main thrust of the retail guidelines is that the vitality and viability of existing town centres should be protected and enhanced. According to the guidelines, vitality is a measure of how active and buoyant a centre is, whilst viability refers to the commercial well being of a town. Planning authorities are encouraged to adopt an active role in protecting and enhancing the vitality and viability of existing town centres.~~

~~2.2.32 The guidelines indicate a number of indicators which determine the vitality and viability or health of existing town centres. These indicators include the range and quality of activities in a centre, mix of uses, accessibility to people living and working in the area and general appearance.~~

~~Draft~~ Retail Planning Guidelines (2012~~1~~)

~~2.2.33~~2.2.25 The Retail Planning Guidelines (2012) were adopted by the Department of the Environment, Community and Local Government in April 2012 and replace the previous Retail Planning Guidelines (2005).

2.2.26 The aim of the Guidelines is to ensure that the planning system continues to play a key role in supporting competitiveness in the retail sector for the benefit of the consumer in accordance with proper planning and sustainable development.

2.2.27 The Guidelines emphasise that enhancing the vitality and viability of city and town centres in all their functions through sequential development is an overarching objective in retail planning. The Guidelines include a presumption against large out-of-town retail centres, in particular those adjacent or close to existing, new or planning national roads / motorways.

2.2.28 The Guidelines have five key policy objectives, namely:

- Ensuring that retail development is plan-led;
- Promoting city/town centre vitality through a sequential approach to development;
- Securing competitiveness in the retail sector by actively enabling good quality development proposals to come forward in suitable locations;
- Facilitating a shift towards increased access to retailing by public transport, cycling and walking in accordance with the Smarter Travel ~~s~~Strategy; and
- Delivering quality urban design outcomes.

2.2.29 The Guidelines emphasise that in order to ensure proper planning and sustainable development, retail development and activity must follow the settlement hierarchy of the State, including the various Gateway and Hub town locations identified in the NSS 2002-2020, the Regional Planning Guidelines and the Core Strategies of Development Plans.

2.2.30 The Guidelines also provide specific guidance for the content and role of Development Plans. It is stated, *inter alia,* that:

- Development Plans must set out clear evidence based policies and objectives in relation to retailing in a discrete section of the Plan;

- Joint or multi-authority retail strategies, where required, will guide the preparation of retail policies and objectives in the relevant Development Plans;

- The need for any additional retail warehousing should be carefully assessed in view of the significant levels of recent provision and potential impacts on vitality and viability of city and town centres;

- At a minimum, City and County Development Plans must:

    - State the elements of their settlement hierarchy in line with the relevant regional planning guidelines and their core strategy;
    - Outline the level and form of retailing activity appropriate to the various components of the settlement hierarchy in that core strategy;
    - Define, by way of a map, the boundaries of the core shopping areas of city and town centres and also location of any district centres;
    - Include a broad assessment (square metres) of the requirement for additional retail floorspace only for those plans in the areas covered by a joint or multi-authority retail strategy;
    - Set out strategic guidance on the location and scale of retail development to support the settlement hierarchy, including where appropriate identifying opportunity sites which are suitable and available and which match the future retailing needs of the area;
    - Identify sites which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area;
    - Include objectives to support action initiatives in city and town centres; such as

- Mobility management measures - that both improve accessibility of retail areas while aiming to develop a pedestrian and cyclist friendly urban environment and vibrant street life;
- Public realm interventions - aimed at improving the retailing experience through high quality civic design, provision of attractive street furnishing, lighting and effective street cleaning/business improvement district type initiatives; and

o Identify relevant development management criteria for the assessment of retail developments in accordance with these guidelines.

2.2.31 Some other key guidance set out in the Retail Planning Guidelines, as relevant to County Meath, includes the following:

- Navan is identified amongst the sub-regional settlements which perform important sub-regional retailing functions including the major national retailing chains;
- 3,000 sq.m. net cap on convenience retail floorspace;
- 6,000 sq.m. gross cap on retail warehouse floorspace;
- The need for any additional retail warehousing should be carefully assessed in view of the significant levels of recent provision and potential impacts on vitality and viability of city and town centres.

2.2.32 One of the key messages of the Retail Planning Guidelines is that a high level of design quality can make an important contribution to the future health of city and town centres. The Guidelines are therefore accompanied by a Retail Design Manual which sets out key principles of urban design which might form the framework for policies to promote quality design in development plans and local area plans. The Manual sets out key principles or urban design under a number of headings (e.g. design, context and character, access and connectivity, density and mixed use, etc) and uses case studies to demonstrate the application of the principles.

~~2.2.33The Draft Retail Planning Guidelines, published in November 2011, are generally based upon the same policies and objectives as the existing Retail Planning Guidelines.~~

~~2.2.34Although the Guidelines are in draft format, the Minister has advised that pending finalisation of the Guidelines, Planning Authorities are required to take account of the principles in their forward planning practices and development management practices, and in particular should begin to apply the revised retail caps detailed in the document.~~

~~2.2.35The Guidelines state that there are five key policy objectives to be progressed in retail planning:~~

- ~~Ensuring development is plan – led,~~
- ~~Promoting and securing the vitality of city and town centres,~~
- ~~Securing competitiveness in the retail sector,~~
- ~~Sustainable travel,~~
- ~~Delivering quality urban design~~

~~2.2.36In particular, the Draft Retail Planning Guidelines set out the following:~~

- ~~Securing the vitality of city and town centres by promoting a sequential approach of locating new development in town centres, followed by edge of centres. The sequential approach will consider in particular issues relating to suitability, availability and viability of sites;~~

- ~~With regard to edge of centre sites, it is stated that *"a development on the edge of an existing centre may be consistent with sustaining and enhancing the vitality and viability of the centre if it is providing for additional choice and competition and diverting potential expenditure from less accessible out-of-centre locations to more accessible edge-of-centre location".*~~

- ~~With regard to out of centre sites it is stated that *"retailing on such sites should be considered only where it can be demonstrated that there are no town centre or edge-of-centre sites which are suitable, viable and available and which can provide the form and scale of development that is required or where there are heritage considerations*".~~

~~2.2.37 The Draft Retail Planning Guidelines (2011) therefore maintain the approach in relation to the preferred location of retail development in town centres, followed by edge of centre sites.~~

~~2.2.38 Paragraph 1.6 of the Guidelines emphasises the importance of strong city and town centres. It states that there should be a presumption against out-of-town retail centres which have the potential to impact negatively on the vitality and viability of the core areas of cities and towns and would generate significant additional traffic with potential to impact on the national road network.~~

~~2.2.39 Some notable policy changes / amendments from the existing Retail Planning Guidelines (2005) include the following:~~

- ~~The Draft Guidelines place further emphasis on the importance of urban design and refer to the proposed "Best Practice Manual" on retail design which is currently being prepared;~~

- ~~The definition of "Town Centre" for the purpose of the sequential test has been changed from one that currently incorporates all centres in the hierarchy from town centre down to neighbourhood centre to one which only incorporates town and city centres;~~

- ~~In relation to edge-of-centre sites the guidelines state that they should be within easy walking distance of the identified primary retail area of the city or town and that the distance cannot be defined precisely as different centres vary in their size and scale. Edge of centre sites were previously defined as being within 300 – 400 metres of the town / city centre;~~

- ~~The Guidelines propose amendments to the retail floorspace caps. With regard to convenience retail floorspace, it is proposed to increase the cap from 3,500 sq. m. to 4,000 sq. m. in the Dublin local authorities and from 3,000 sq. m. to 3,500 sq. m in Cork, Limerick / Shannon, Galway and Waterford. The convenience retail floorspace cap is reduced from 3,500 sq. m. to 3,000 sq. m. in the rest of the Greater Dublin Area – Meath, Kildare and Wicklow.~~

~~•Annex 1 of the Draft Guidelines provides an amended definition of 'bulky goods' which now includes *'household appliances'* and *'tools and equipment for* the *house and garden'.* The Guidelines also make specific reference to *'ancillary items associated with an otherwise bulky good'* and says that such ancillary products *'should not exceed 15% of the total net retail floorspace'.* The Guidelines emphasis that bulky goods are truly bulky goods or goods generally sold in bulk which are not portable by customers traveling by foot, cycle or bus.~~

Development Plan Guidelines for Planning Authorities (June 2007)

~~2.2.34~~2.2.33 These Guidelines were adopted under Section 28 of the Planning and Development Act 2000, as amended, and their aim is to:

- Improve the quality and consistency of development plans, and thereby improve the quality and consistency of decisions on planning applications,
- Strengthen the strategic content of development plans, in the context of the hierarchy of plans envisaged under the 2000 Act, and
- Encourage consensus-building in the preparation, implementation and review of development plans.

~~2.2.35~~2.2.34 The Guidelines include guidance on the preparation of the retail planning strategy to be included in a Development Plan.

~~2.2.36~~2.2.35 It is stated at Paragraph 3.13 that, in accordance with the Retail Planning Guidelines all City and County development plans are required to incorporate the following retail planning policies:

(i) "Confirmation of the retail hierarchy including the role of urban centres of differing sizes, and the size of the main town centres.
(ii) Definition in the development plan of the boundaries of the core shopping areas of cities and towns.
(iii) A broad assessment of the requirement for additional retail floorspace.
(iv) Strategic guidance on the location and scale of retail development.
(v) Preparation of policies and action initiatives to encourage the improvement of town centres.
(vi) Identification of criteria for the assessment of retail developments".

~~2.2.37~~2.2.36 The Guidelines also advise that *"the retail hierarchy should be clearly linked to and evolved from the settlement hierarchy envisaged in the settlement strategy elements of the development plan. It should take into account the needs of consumers in terms of facilitating a competitive retail environment, while promoting development at locations which are readily accessible, particularly by public transport, and in forms which support multi-purpose trips on the same journey".*

~~2.2.38~~2.2.37 It is further noted that paragraph 4.55 states that within the housing strategy and retail strategy, it is recommended that planning authorities should adopt policies of promoting the re-utilisation of suitable redundant or obsolete structures, and where appropriate, the use of protected structures for housing, retail or other purposes.

Smarter Travel – A Sustainable Transport Future – A New Transport Policy for Ireland 2009 – 2020

2.2.38 This document is designed to show how we can reverse current unsustainable transport and travel patterns and reduce the health and environmental impacts of current trends and improve quality of life.

2.2.39 The document outlines that key to achieving this will be better integration of land use and planning and transport policies. A key target of the document is that future population employment growths will predominantly take place in sustainable compact forms which reduces the need to travel for employment and services. A key action of the guidelines is a general restriction on the development of out of town retail centres except in exceptional circumstances and consideration of a similar requirement that parking charges be introduced for most existing centres.

2.3 Regional Level

Regional Planning Guidelines for the Greater Dublin Area 2010 – 2022

2.3.1 The 'Strategic Vision' of the Regional Planning Guidelines is as follows:

"The GDA by 2022 is an economically vibrant, active and sustainable international Gateway Region, with strong connectivity across the GDA Region, nationally and worldwide; a region which fosters communities living in attractive, accessible places well supported by community infrastructure and enjoying high quality leisure facilities; and promotes and protects across the GDA green corridors, active agricultural lands and protected natural areas".

2.3.2 The Regional Planning Guidelines for the Greater Dublin Area 2010 – 2022 estimate that the population of the Mid-East region is set to increase from 514,500 in 2008 to 594,600 in 2016 and 639,700 in 2022.

2.3.3 Specifically in relation to County Meath, population is estimated to increase from 162,831 in 2006 to 195,898 in 2016 and 210,260 in 2022.

2.3.4 With regard to County Meath, it is stated that:

"With a strong network of urban centres, a vibrant rural area, well developed transport system and a rich and varied built and natural heritage, County Meath has the opportunity to make a key contribution to the achievement of the vision statement of the RPGs. The key foci for the county over the lifetime of these guidelines will be to utilise the recent investments in transport and related infrastructure as a basis for sustainable development and to encourage investment in community, recreational, commercial and economic development to support the population of the county".

2.3.5 Particular reference is made in the Regional Planning Guidelines to:

- Opportunities to focus growth in association with the construction of the rail line to Dunboyne;

- The continuing development of policies which utilise the increased connectivity brought about by improvements in the road and rail systems to enhance the economic profile of the county;

- Support the extension of the rail line to Navan which will facilitate the sustainable expansion of both Navan and Dunshaughlin;

- Strategic location of Dunshaughlin on the future Navan-Dublin rail line, with its resulting multi modal transport links, will facilitate the development of the town based on best sustainability principles.

2.3.6 The RPG's designate the Navan Economic Growth Area, which includes Navan as the principal economic growth town, and which also includes Kells and Trim. It identifies locational strengths as including ever improving multi-modal growth corridor linkages such as the M3 and the Navan Rail line.

2.3.7 With regard to Navan, it is detailed that *"potential remains in developing and expanding business and technology such as manufacturing, international services and higher order retail in the town and its environs".* Navan is identified as the County Town of Meath and the principal growth town in this core economic area. Having regard to Navan's position as set out in the RPG's, it is~~si~~ clearly identified as the key town in County Meath.

2.3.8 With regard to Kells, it is stated that potential exists to develop Kells as a tourism cluster.

2.3.9 Ashbourne and Dunboyne are identified as 'Secondary Economic Growth Towns'. The RPG's state that such towns *"have an important supporting and comple~~i~~mentary role in development economic growth and sectoral strengths in tandem with the primary economic growth towns".* It is stated that the areas should be developed cognisant of their supporting role and settlement character within the region and relative to supporting physical, social, technical requirements and investments.

2.3.10 With regard to Ashbourne, and also Ratoath, it is stated that:

- Ashbourne is the second largest town in County Meath and has experienced significant economic growth since the 2004 RPGs.
- As a moderate sustainable growth town, Ashbourne has an important role in service provision for its large catchment.
- The future development of Ratoath will be linked to that of Ashbourne and Dunshaughlin and should aim to capitalise on the synergy with those settlements.
- Ratoath has a large, well educated commuter labour force which is a valuable resource for future local economic development in a sustainable manner. It is important that Ratoath should become more self sustaining in terms of providing employment opportunities locally.

2.3.11 This emphasises the importance of consolidating development in Ashbourne in terms of service provision for the local community, and also the importance of ensuring that Ratoath is self-sustainable.

2.3.12 With regard to Dunboyne, it is stated that the town *“. . . has yet to realise its long term potential but plays an important role in this economic growth area given its status and location on a developing rail line. . . The designation of Dunboyne within the GDA retail hierarchy illustrates the economic potential of the town over a designated time span. This economic growth area experiences high levels of outward commuting patterns to the Dublin area, and it is important that economic stimuli measures are underpinned by necessary infrastructure investment, particularly in relation to water and waste water services*”.

2.3.13 The RPG’s therefore recognise the potential for further growth in Dunboyne, having regard to its strategic location on the rail line. As will be seen below, the Retail Planning Strategy for the Greater Dublin Area 2008 – 2016 indicates that Dunboyne will develop to a Level 2 town over the next 20 years.

~~2.3.14~~Whilst Drogheda town centre is located within the administrative area of Louth County Council, the southern environs of Drogheda, including the Southgate development and the Retail Park at Donore Road are within the administrative area of Meath County Council. The RPG’s recognis~~z~~e that whilst Drogheda is an inherent part of the Border region *“its development is strongly influenced by its relative proximity to Dublin”.* Drogheda is identified as a primary economic growth town. ~~It is noted in the RPG’s that is a strength in Drogheda.~~

~~2.3.15~~2.3.14

Retail Planning Strategy for the Greater Dublin Area 2008 - 2016

~~2.3.16~~2.3.15 The 2008-2016 Retail Planning Strategy for the Greater Dublin Area was adopted in July 2008. The Strategy updates and reviews the previous Retail Planning Strategy from 2001 to take into account the significant economic, demographic and policy changes in the Greater Dublin Area in the intervening period.

~~2.3.17~~2.3.16 The stated purpose of the Retail Planning Strategy for the Greater Dublin Area 2008 -2016 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”.*

~~2.3.18~~2.3.17 The Strategy states that it 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”.*

~~2.3.19~~2.3.18 The Strategy sets out a retail hierarchy for the GDA which aims to confirm the role of Dublin City as the prime retailing centre, and to set out a hierarchy of retail centres and County towns (see Figure 2.3 overleaf).

~~2.3.20~~2.3.19 Navan is designated as a Level 2 Major Town Centre within the retail hierarchy in the Strategy. Navan is the only Level Two Major Town Centre in Meath. In relation to Level 2 centres, the strategy acknowledges that Level Two centres should *"offer the widest access to shopping activities for the greatest number of people".*

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 2.3: Retail Hierarchy for the Greater Dublin Area

~~2.3.21~~2.3.20 The Strategy identifies Dunboyne, Ashbourne, Dunshaughlin, Kells, Trim, Laytown/Bettystown, Enfield as Level 3 centres, which are town and/or district centres and sub-county town centres. It is clarified that Dunboyne will gradually develop over the next 20 years towards level 2 status. In relation to Level 2 centres, it is stated that it is *"very important that in order to achieve sustainable and inclusive strategy such centres offer widest access to shopping activities for the greatest number of people..................In planning for growth in town centres, planning authorities should allocates sufficient sites and expansion areas to meet identified need; and where necessary use compulsory purchase powers to bring forward important sites."*

~~2.3.22~~2.3.21 Specifically in relation to Meath, the Strategy recommends specific policy objectives which should form part of the issues addressed in individual retail strategies. Such specific policy objectives for Meath are as follows:

- *"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 Integrated Framework Plan for Land Use and Transportation Plan and the Local Area Plan for Dunboyne".*

~~2.3.23~~2.3.22 The Strategy also re-affirms the guidance set out in the Retail Planning Guidelines ~~(~~2012~~05 (which have now been replaced by the Retail Planning Guidelines 2012))~~ in terms of the sequential approach to retail development and the importance of the protection and enhancement of the vitality and viability of town centres.

2.4 Local Level

2.4.1 At the City and local level, the plans and strategies, which have an influence, or will have an influence on the Retail Strategy, are:

Development Plans

- Meath County Development Plan 2007 – 2013
- Navan Development Plan 2009 – 2015;
- Kells Development Plan 2007 – 2013;
- Trim Development Plan 2008.

Local Area Plans

- Dunboyne Clonee Pace Local Area Plan 2009;
- Ashbourne Local Area Plan 2009;
- Dunshaughlin Local Area Plan 2009;
- East Meath Local Area Plan 2005;
- Enfield Local Area Plan 2009;
- Drogheda Southern Environs Local Area Plan 2009;
- Athboy Local Area Plan 2009;
- Duleek Local Area Plan 2009;
- Kilcock Local Area Plan 2009;
- Oldcastle Local Area Plan 2009;
- Ratoath Local Area Plan 2009;
- Slane Local Area Plan 2009.

2.4.2 The above listed towns / settlements have been examined as in the case of Navan, Kells, Trim, Dunboyne, Ashbourne, Dunshaughlin, Laytown/Bettystown, Enfield and Drogheda, they appear in the retail hierarchy as set out in the Retail Planning Strategy for the Greater Dublin Area 2008. The other towns are examined as it is considered that they are the main larger settlements in the County which serve retailing needs.

~~**Meath County Development Plan 2007 – 2013**~~

~~Introduction~~

~~2.4.3 The Meath County Development Plan 2007 – 2013 is the relevant Development Plan for the County. This Retail Strategy is intended to inform the preparation of this Development Plan and the preparation of the Meath County Development Plan 2013 – 2019.~~

~~Settlement Hierarchy~~

~~2.4.4 It is noted that Meath County Council published Draft Variation 12 on the 14th June 2011 with the purpose of adopting a new Core Strategy for the County Development Plan.~~

~~2.4.5 Draft Variation No. 12 of the County Development Plan confirms the following settlement hierarchy for the County:~~

~~*Large Growth Town I:*~~
~~Navan, Drogheda Environs~~

~~*Large Growth Town II:*~~

~~Dunboyne~~

~~*Moderate Sustainable Growth Towns:*~~
~~Ashbourne, Kells, Trim, Kilcock, Dunshaughlin~~[1]

~~*Small Towns:*~~
~~Athboy, Bettystown/Laytown/Mornington East, Duleek, Enfield, Oldcastle, Ratoath, Stamullen~~

~~*Villages:*~~
~~Ballivor, Longwood, Nobber, Slane, Summerhill, Clonee, Carlanstown, Carnaross, Clonard, Crossakiel, Donore, Drumcondrath, Gibbstown, Gormonston, Julianstown, Kentstown, Kilbride, Kildalkey, Kilmainwood, Kilmessan, Mornington/Donacarney, Moynalty, Rathcairn, Rathmolyon.~~

~~General Retail Strategies~~

~~2.4.6 In terms of retail, the Development Plan sets out the following strategy:~~

- ~~Ensure that there is sufficient retail floorspace in the county and that this floorspace is located in an efficient, equitable and sustainable manner, having regard to the Retail Planning Guidelines and to the Retail Planning Guidelines for the Greater Dublin Area;~~

- ~~Maintain the dominant retailing and County Town Centre functions of Navan;~~

- ~~Reinforce the role of town centres as places for work, shopping, services and living within the major centres of Navan, Ashbourne, Kells and Trim supported by the identification of a network of district and neighbourhood centres;~~

- ~~Ensure that the provision of additional retail floorspace relates to the hierarchy of retail centres adopted and is compatible with the scale, character and function of receiving centres;~~

- ~~Ensure that proposed commercial developments, where appropriate, will incorporate retail, residential, employment and entertainment / cultural and civic uses, and provide adequate support facilities for shoppers and access for people with disabilities;~~

- ~~Maintain and strengthen the retail character of key shopping areas in existing centres, while protecting and / or improving the amenities of surrounding areas, and;~~

- ~~Facilitate the provision of retail warehousing, retail parks and discount food stores in the county subject to appropriate protection of centres in the retail hierarchy.~~

~~County Retail Hierarchy~~

[1] The Development Plan states that *"Dunshaughlin will become a Moderate Sustainable Growth Town following the granting of permission of a railway order for the Navan Rail Line Phase II, including a station at Dunshaughlin".*

~~Chapter 3 'Economic Development' of the County Development Plan sets out the Retail Hierarchy for the County as follow~~

Meath County Retail Hierarchy		
	METROPOLITAN AREA	HINTERLAND AREA
LEVEL 2	Major Town Centre	County Town Centres
		Navan
LEVEL 3	Town and / or District Centres	Sub-County Town Centre
	Dunboyne	Ashbourne, Dunshaughlin, Kells and Trim (noting Drogheda and Kilcock Environs)*
LEVEL 4	Neighbourhood Centres / Small Towns	Local Centres – Small Towns and Villages
	Clonee	*Tier 1 Small Town Centres:* Athboy, Bettystown, Duleek, Enfield, Oldcastle and Ratoath. *Tier 2 Village Centres* Ballivor, Laytown, Longwood, Nobber, Slane, Stamullen & Summerhill.
LEVEL 5	Corner Shops	Smaller Village Centres / Crossroads
		Smaller villages / crossroads – rural shops (post offices, creameries, public houses, petrol filling stations etc.)

**Drogheda is a Level 1 Tier 3 centre in the national retail hierarchy and Kilcock is a Level 3 centre in the GDA hierarchy. These designations are specific to the town centres and their roles but their environs will also be areas for retail development. Both are noted within the County Retail Hierarchy as parts of their environs are within the County's boundaries.*

Figure 2.4: Extract from Table 16 of the Meath County Development Plan 2007 - 2013

Navan Development Plan 2009 – 2015

Settlement Strategy

~~2.4.8~~2.4.3 The Navan Development Plan 2009 – 2015 was adopted in November 2009. In terms of the settlement strategy for Navan, the Development Plan includes the following policies:

- *"Settlement Strategy POL 1 To facilitate the continued development of Navan as a large growth town and promote its status as a primary dynamic cluster in partnership with Trim and Kells and as a key economic driver in line with the policies prescribed in the County Development Plan 2007-2013 & Regional Planning Guidelines 2004-2016;*

- *Settlement Strategy POL 2: To promote the development of Navan as a self sustaining centre incorporating employment activities, sufficient retail services and community facilities".*

~~2.4.9~~2.4.4 The Development Plan also includes a number of objectives in relation to the Settlement Strategy. Of relevance are the following:

- *"Settlement Strategy OBJ: 1 To provide sufficient and appropriately located land for industrial and commercial development;*

- *Settlement Strategy OBJ 4: To promote a more compact urban form;*

- *Settlement Strategy OBJ 7: To consolidate the existing Town Centre Development and the identified Town Centre expansion area as a principal shopping area in the town".*

Retail Policies

~~2.4.10~~2.4.5 As indicated previously, the Retail Planning Strategy for the Greater Dublin Area 2008 – 2016 identifies Navan as the only Level 2 centre within County Meath.

~~2.4.11~~2.4.6 The Development Plan states that:

"Navan has a relatively compact town centre and retail core formed by Trimgate St., Market Sq. Ludlow Street and Kennedy Road along with the purpose built shopping centre. The retail core provides a wide variety of higher/middle comparison goods in a range of retail outlet sizes. Shopping provision in the town is based on a hierarchy of centres".

~~2.4.12~~2.4.7 The Development Plan also describes the current retail hierarchy in Navan is as follows:

- Navan Town Centre (including Navan Shopping Centre);
- Neighbourhood Centres (Blackcastle, Beechmount, Johnstown);
- Local Corner Shops and Forecourt Outlets.

~~2.4.13~~2.4.8 The Navan Development Plan highlights the following actions for Navan set out in the County Retail Strategy:

- Achieving consolidation and intensification of retail development and other town centre uses should be a priority over the period of the Retail Strategy to 2015;

- Provision of prime pitch locations at the heart of the town centre to attract brand name national and international comparison multiples;

- Forward planning in respect of the development of Navan into a city and regional capital over the period to 2015;

- Provision of neighbourhood centres to serve residential communities where appropriate.

~~2.4.14~~2.4.9 The Navan Development Plan explains that Navan has potential for expansion of the town centre on sites and areas adjacent or close to the existing centre. It is further stated that:

"To sustain the strength of the town centre it is important that town centre development/expansion, as far as is practicable, moves sequentially across this area and that all proposals ensure a continuum and real linkage. The long-term expansion of the town centre is envisaged towards the proposed integrated public transport interchange".

Kells Development Plan 2007 – 2013

~~2.4.15~~2.4.10 The Kells Development Plan 2007 – 2013 was adopted on the 1st October 2007. The Development Plan is currently under review. A Draft Kells Development Plan 2013 – 2019 is expected to be published in Autumn 2012.

~~2.4.16~~2.4.11 In terms of retail, the Kells Development Plan states that:

"The town centre area of Kells has retained a compact form. The core retail area of Kells comprises of Farrell Street, Cross Street, John Street, Castle Street, Market Street and includes the site of the existing Kells Sshopping Ceentre. The medieval street pattern has resulted in a difficulty in accommodating the requirements of modern retailing in the town. The retail mix in the town centre is quite limited when examined in comparison with similar sized towns".

~~2.4.17~~2.4.12 With regard to existing and future retail offer, the Kells Development Plan further states that:

- There is no representation of national or international multiples;
- There has been limited retail investment over the pre-ceding 2001 plan period;
- Addressing deficiencies in the retail offer of Kells must be addressed in conjunction with promotion of the heritage of the town and with urban improvements to the town centre area.

~~2.4.18~~2.4.13 The Development Plan acknowledges that Kells is designated as a Level 3 sub-county town centre in the Greater Dublin Area retail hierarchy and this is confirmed in the Meath County Retail Hierarchy.

~~2.4.19~~2.4.14 The Kells Development Plan highlights the following actions for Kells set out in the County Retail Strategy:

- Both Councils need to continue progress with land acquisition and site assembly in order that the opportunities for town centre development are secured;
- Both Councils need to look at the emerging needs of existing and expanding residential areas specifically with regards to convenience shopping and ensure that the correct land use zonings are in place;
- Progress should be pursued as a priority on all road proposals required to untap the potential and attraction of sites within Kells town centre;

- There needs to be an examination of the mechanisms that could assist the delivery of key town centre sites. This should include marketing strategies, the potential of Public Private Partnerships and direct market testing of developers and operators;

- The preparation of strategies that embrace heritage, signage, linkages and interpretation;

Trim Development Plan 2008 - 2014

~~2.4.20~~2.4.15 As part of the Development Plan process the Planning Authority undertook a general analysis of retail trends and conditions in Trim. The key issues identified in the Trim Retail Evaluation can be summarised as follows:

- Limited existing retail floor space;
- Lack of multi-national investment, and;
- Traffic congestion.

~~2.4.21~~2.4.16 The Plan recognises the need to examine the emerging needs of existing and expanding residential areas specifically with regards to convenience shopping and ensure that the correct land use zonings are in place.

~~2.4.22~~2.4.17 The Development Plan describes that the town centre area of Trim has retained a relatively compact form. The core retail area of Trim as defined in the County Retail Strategy includes parts of Castle Street, Bridge Street, Market Street, Watergate Street and Emmet Street.

~~2.4.23~~2.4.18 It further describes that the retail mix in the town centre is quite limited when examined in comparison with similar sized towns. There is little representation of national or international multiples with the exception of a discount grocery store.

~~2.4.24~~2.4.19 The existing historic street pattern within the town centre is also noted as having presented difficulty in accommodating the requirements of modern retailing in the town.

It is noted in the Development Plan that, notwithstanding the recently approved town centre expansion on lands just west of the existing core retail area, there remains considerable scope for further retail development at appropriate locations in the Trim environs to serve the needs of the expanding resident population and its surrounding rural hinterland.

Dunboyne Clonee Pace Local Area Plan 2009

~~2.4.25~~2.4.20 The LAP explains that Dunboyne is a Level 3 Centre Sub County Town Centre within the Metropolitan Area in the 2007 – 2013 County Development Plan. It is a stated objective of the LAP that Dunboyne moves to a Level 2 town, alongside Navan, over the next 15 – 20 years. This is in accordance with the Retail Planning Strategy for the Greater Dublin Area 2008 – 2016.

~~2.4.26~~2.4.21 Clonee is designated as a Level 4 Neighbourhood Centre / Small Town within the Metropolitan Area.

~~2.4.27~~2.4.22 In terms of the availability of land for future retail development, the LAP states that:

"The lands currently available in the centre of Dunboyne are inadequate in terms of scale or location to allow for the growth from Level 3 to Level 2 status. The structure of Dunboyne is not conducive to significant expansion of the retail core. Lands to the north and south of Dunboyne comprise significant residential development. The western and eastern sides of Dunboyne are committed in the form of residential lands. Lands north of Dunboyne at Pace identified in this Local Area Plan are the most viable location for the required expansion of comparison retailing in the Corridor over the medium and long term".

~~2.4.28~~2.4.23 The LAP explains that in addition to consolidating the retail function of town and village centres, it is also a requirement to provide retail uses convenient to residential areas. In this regard, the Local Area Plan has zoned appropriate areas to serve local retail needs.

~~2.4.29~~2.4.24 The LAP also noted that an application for a major new mixed use (including retail) development on lands adjacent Dunboyne town centre was granted permission by the County Council in April 2009 (Reg. Ref. DA802292). This permission has subsequently been upheld by An Bord Pleanala at appeal. This application seeks the provision of c. 5,640 sq. m. of retail space, including a 2,325 sq. m. gross supermarket and 20 no. accompanying retail units.

~~2.4.30~~2.4.25 With regard to Clonee, the LAP states that it is the policy of the County Council to limit the scale of retail development to be located in Clonee due to its small scale, distance from the railway line and proximity to Blanchardstown and Liffey Valley.

~~2.4.31~~2.4.26 The following retail objective in relation to Pace is also noted:

- *"RET OBJ 1: A unitary framework plan for the designated level 2 centre at Pace will proceed in a timely fashion and will address land use, transportation, connectivity, urban design, recreation, implementation issues. Delivery of the centre shall be time lined and co-ordinated in tandem with infrastructural provision across the Corridor Area. In order to achieve the future target of 15,000 population within the life time of this Local Area Plan, it shall be a grounding objective of this plan to encourage development in a sustainable, co-ordinated and efficient manner where such development is facilitated and accompanied by the required infrastructure and services".*

Ashbourne Local Area Plan 2009

~~2.4.32~~2.4.27 The Ashbourne Local Area Plan describes that *"the rapid growth in population has seen major investment in the retail sector, most markedly in Ashbourne"* and that *"the quantum, quality and range that both the existing and new town centre offers has resulted in Ashbourne becoming the second largest retail centre in the County after Navan*". It is further described that the town centre of Ashbourne has been transformed, with an influx of many big name retailers.

~~2.4.33~~2.4.28 In terms of future retail provision, it is stated that the planning authority *"recognise that future growth in convenience, comparison and retail warehousing, that meets the needs of the area including the Greater South Meath Fringe and local people, is an essential requirement in creating a sustainable urban settlement and will in turn reduce leakage of spend from the south of the County*".

~~2.4.34~~2.4.29 Ashbourne Core Retail Centre is described as including the majority of lands zoned to accommodate town centre uses on the east and west side of Frederick Street stretching from the Ashbourne Shopping Centre southwards and incorporating the New Ashbourne Town Centre.

Dunshaughlin Local Area Plan 2009

~~2.4.35~~2.4.30 The Dunshaughlin Local Area Plan describes that *"there is a strong retail focus in the town centre of Dunshaughlin, with the Main Street lined with bespoke and independent retailers that add variety and interest to the town*".

~~2.4.36~~2.4.31 The LAP goes on to state that *"the town is unique in that its centre has remained the focus of retailing. It is well acknowledged amongst retail authorities that comparison retailing is what attract visitors to a town centre and attraction of visitors introduces vitality and maintains vibrancy. The overarching objective of this Plan is, therefore, to ensure that this focus remains and that the policies advanced with regard to retailing protect town centre vitality and viability".*

~~2.4.37~~2.4.32 The Plan identifies three locations for neighbourhood centres at strategic locations throughout the town such that the needs of residents are met in the most efficient, equitable and sustainable manner. One such centre is located to the west of the Community College and accessed off the M3 Distributor Link Road to the north-west of the town. A second new neighbourhood centre is identified for lands in the area of the station.

~~2.4.38~~2.4.33 The Local Area Plan states that *"outside the retail core that makes up the lands zoned B1 in the town centre, retail development will only be considered at the identified neighbourhood centres".* It is further described that an exception to the overall policy of consolidating and reinforcing the retail function of the town centre is the provision of retail warehousing.

East Meath Local Area Plan 2005

~~2.4.39~~2.4.34 The East Meath LAP splits the administrative area of the LAP into two regions. The East Meath Local Area Plan – North comprises of the urban areas of Donacarney, Mornington, Bettystown, Laytown, Mornington East and Julianstown. The East Meath Local Area Plan – South comprises of the urban areas of Stamullen and the village of Gormanston including the former Department of Defence Military Aerodrome.

~~2.4.40~~2.4.35 The LAP describes that all of the designated settlements in the East Meath Local Area Plan - North have experienced a notable increase in the amount of residential development over the period of the East Meath Development Plan 2000 and that in some of those settlements, such as Laytown and Bettystown, the increase has been significant. With regard to the settlements in East Meath Local Area Plan – South, it is described that Stamullen has experienced a rapid expansion in the amount of residential dwellings in a relatively short period of time but that the village of Gormanston has not experienced large-scale development to the same extent as other settlements in East Meath.

~~2.4.41~~2.4.36 Among the policy objectives of the LAP is to *"seek to reduce the need for those who live in East Meath to commute outside of the area to access employment".*

~~2.4.42~~2.4.37 The LAP describes that it is generally the objective of the Planning Authority to encourage central locations for new retailing activity and consider the needs of residential neighbourhoods in catering for local shopping needs.

~~2.4.43~~2.4.38 The LAP proposes to utilise framework plans in seeking to achieve quality developments. The Local Area Plans identify large or key sites that will require the preparation of approved framework plans and subsequent planning applications in these areas will be required to adhere to the approved plans. Framework Plans have been adopted for the development of specific sites in Stamullen (2007) and Bettystown (2009).

Enfield Local Area Plan 2009

~~2.4.44~~2.4.39 The Enfield LAP describes that the former N4 (R148) makes up the town's main retail street and is intersected by the R159 (Trim road) and R402 (Edenderry-Johnstown Bridge Road). It is further described that Enfield supports a wide range of retail, commercial and professional services, catering for the resident population, surrounding hinterland and through traffic.

~~2.4.45~~2.4.40 Despite the acknowledgement of the good range of facilities offered in Enfield, the LAP indicates that *"the town would benefit from having a greater range and variety of retail facilities".*

~~2.4.46~~2.4.41 The LAP therefore designates two sites for expansion of retail uses in the town. One such site is zoned *"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". The second site has been zoned "to provide for visitor and tourist accommodation and leisure facilities".*

~~2.4.47~~2.4.42 It is also notable that Policy LUP8 of the LAP seeks to consolidate the expanded central areas of the town for commercial uses.

Athboy Local Area Plan 2009~~ – 2015~~

~~2.4.48~~2.4.43 The Local Area Plan describes that *"the overall focus and vision for Athboy is to consolidate and strengthen the Town, through the provision of a well-defined Town Centre area, as well as a range of land-uses to support the residential element of the Town and its role as a 'Service Centre' to the surrounding local area".*

~~2.4.49~~2.4.44 It is further stated that the function, role and overall size of the town has largely been determined by its proximity to the surrounding urban areas of Trim, Navan and Kells, and to an extent its wider location within the Greater Dublin Area. The LAP states that the main function of the town is to serve as a service centre for the significant surrounding agricultural sector and to cater for the weekly shopping needs of this population.

~~2.4.50~~2.4.45 Athboy's retail and commercial areas are located along Main Street, Lower and Upper Bridge Street, O'Growney Street and Connaught Street. Athboy's retail provision mainly comprises of convenience retailers, although it does contain some comparison goods, such as boutiques and clothes shops.

~~2.4.51~~2.4.46 Furthermore, Athboy has an existing level of enterprise and employment generating uses, specifically related to agriculture and the building industry within the Town Centre core.

~~2.4.52~~2.4.47 The relocation of the *MacCann & Byrne* Building Construction suppliers to a more appropriate location in order to allow for the release of a significant brownfield site within the Town Centre is an objective of the LAP. The LAP also highlights that there is potential for the Athboy to cater for a greater share of the tourism market within the County.

~~2.4.53~~2.4.48 The Local Area Plan describes that Athboy Main Street is wide and framed by the frontages of mainly two-storey buildings with diverse building styles along its northern and southern sides, some dating from the eighteenth century. The Main Street is described as being attractive.

Drogheda Southern Environs Local Area Plan 2009

~~2.4.54~~2.4.49 That part of Drogheda to the west of the River Boyne and extending south towards the Southgate Shopping Centre at Colpe's Cross is included within the Co. Meath administrative area. The area also extends west to include Drogheda Retail Park. Whilst the town centre is not included within the administrative area, some significant retail developments such as the aforementioned Drogheda Retail Park on Donore Road and Southgate Shopping Centre to the south of the town are included.

~~2.4.55~~2.4.50 The LAP describes that retail development has been strong within Drogheda and its environs over the past decade, and that significant retail developments in the wider Drogheda area include Scotch Hall Phase 1 Shopping Centre, providing some 13,000 sq. m. total gross retail floorspace, and the St. Laurence Shopping Centre, which opened off St. Laurence Street in May 2006 providing approximately 14,865 sq. m. of retail accommodation.

~~2.4.56~~2.4.51 Drogheda Retail Park, served off the Drogheda M1 Bypass has also attracted trade to the western environs of the town and the Newgrange Business Park (which has a discount food retailer and electrics store as well as a number of other outlets close by) and the M1 Retail Park (which has a number of DIY and furniture stores as well as discount food retailers) provide for further retail offer in Drogheda.

~~2.4.57~~2.4.52 In addition to the above, it is described that there are a large number of local shops, mostly in the form of small convenience retailers / 'corner shops' adjacent the study area. As well as this, there are a number of neighbourhood centres in the vicinity of the LAP area, located at Colpe Cross, Bryanstown Cross route, Wheaten Hall and Rathmullan Road.

Duleek Local Area Plan 2009

~~2.4.58~~2.4.53 The Duleek LAP describes that over the past decade significant residential development has taken place in Duleek and that continued growth at this level would be unsustainable and inappropriate to the role of the town within the County Development Plan settlement strategy. Therefore, the County Settlement Strategy recommends that the development of small growth towns such as Duleek should be slowed dramatically and more closely linked to local growth rather than to regional growth. The LAP therefore describes that new development in Duleek should contribute towards maintaining a compact settlement and promote the consolidation of the town centre.

~~2.4.59~~2.4.54 It is set out in the Local Area Plan that *"the Town Character and Design Strategy for Duleek aims to promote the development of a high quality, well designed, well landscaped and appropriately scaled environment that is in keeping with the existing character, amenity, environment, heritage and landscape of the town".*

Oldcastle Local Area Plan 2009

~~2.4.60~~2.4.55 The LAP provides the following vision statement for Oldcastle:

"To capitalise on Oldcastle's position as a historic employment and service centre for North Meath by providing a positive policy framework for economic growth and community development whilst preserving the built and natural environment and ensuring that development is both sustainable and of high quality".

~~2.4.61~~2.4.56 It is described in the LAP that the Square continues to form the commercial core of the town supporting a wide range of retail, commercial and professional services, catering for the resident population, surrounding hinterland and passing trade. It is also described that the Town is also uniquely vibrant in the County from a commercial perspective due to a robust traditional manufacturing base (furniture and engineering) and strong service sector employment.

~~2.4.62~~2.4.57 The LAP states that the traditional town centre must be maintained in conjunction with Oldcastle's strategic role as a location for businesses, shopping, services, culture, leisure, community and civic facilities. The LAP seeks to promote a vibrant mix of uses in the town centre. Retail led regeneration is encouraged, particularly where it also provides for the promotion of tourism. Particular areas identified for improvement is the convenience offer in the town and improvements to parking and traffic calming measures.

Kilcock Local Area Plan 2009

~~2.4.63~~2.4.58 The study area to which this LAP relates comprises approximately 105 hectares (ha) of lands, and is located in the administrative area of Meath County Council and contiguous to the County Kildare administrative boundary. Development within the LAP lands consists of low density dwellings forming ribbon development along the local road network.

~~2.4.64~~2.4.59 The aim of the LAP is *"to create an attractive and high quality environment for people to live, work and socialise, where healthy, vibrant and diverse communities can grow and to achieve a model of sustainable urban development through the promotion of a range of residential, commercial, recreational and community uses and sensitive enhancement of the natural environment".*

~~2.4.65~~2.4.60 The LAP describes that its main focus is to accommodate regional and local population growth, complemented by necessary community, education and commercial supports, through a Plan led approach that will also integrate with and complement the current and future expansion of Kilcock Town.

~~2.4.66~~2.4.61 In terms of retail development, one of the 'Framework Principles' set out in the LAP is to *"identify and provide a range of amenities, community facilities and primarily localised retail services to meet the needs of the population within the LAP area".*

Ratoath Local Area Plan 2009

~~2.4.67~~2.4.62 The LAP states that:

"The overall vision for Ratoath is to consolidate and strengthen the town, provide for a defined town core and a small range of landuses to support the residential element of the town. Specific emphasis is placed on retaining the character of the town and encouraging compatible newer developments and landuses within the town while at the same time curbing ribbon development, improving local services and infrastructure and maintaining a clear and definite division between the town and countryside. The plan also aims to ensure the continued vitality and viability of the town and the protection and enhancement of its natural and built heritage".

~~2.4.68~~2.4.63 It is stated in the LAP that in recent years the outskirts of the town have become submerged in residential development and that this pattern of development is unsustainable and has occurred in many instances with the absence of local shopping facilities.

~~2.4.69~~2.4.64 The LAP further describes that the central area of Ratoath is constrained in terms of availability of specific sites to expand the retail and commercial functions of the town. It is stated that in order to facilitate further development of these sectors additional lands for local and neighbourhood shopping facilities have been zoned on the Ashbourne Road to the southeast of the Ballybin Road roundabout. It is intended that the area will provide for a mix of commercial and local retail services.

Slane Local Area Plan 2009

~~2.4.70~~2.4.65 The 'Economic Development & Tourism Strategy' set out in the Slane LAP includes the objective *"to support Slane's position as a Tier 2, Level 4 settlement in the County Retail Strategy and to encourage the upgrading and expansion of the existing local shops and services and the development of new local shops and services in the village centre area to serve local need and promote tourism, as appropriate and in accordance with the Meath County Retail Strategy".*

~~2.4.71~~2.4.66 This is also reflected in Policy EDT POL 2 of the LAP. The historic town of Slane has a relatively limited retail offer concentrated along the Main Street.

2.5 Summary and Conclusions

Conclusions in relation to National Planning Policy

2.5.1 The national planning policy sets out a strategic framework for the development of the region, based upon a series of designated growth towns and areas. Whilst the National Spatial Strategy does not identify any gateways or hubs in County Meath, Navan is identified as the County Town and as a primary development centre, and the NSS also identifies that Kells and Trim have urban strengthening capacity. Future development in the County should be directed towards these centres in particular.

2.5.2 With regard to other towns such as Duleek~~,~~, Dunboyne and the Laytown / Bettystown / Mornington conurbation, the NSS states that, whilst the main focus for growth will be the primary development centre (i.e. Navan), these towns will cater for local growth in residential, employment and service functions.

2.5.3 Based upon the guidance set out in the Retail Planning Guidelines (2012~~05~~)~~ and the Draft Retail Planning Guidelines (2011)~~, retail development should be directed towards town centres in the first instance, and where there are no suitable, viable and available town centre sites, development should be directed to edge of centre locations, followed by out of centre locations. The main thrust of the retail guidelines is that the vitality and viability of existing town centres should be protected and enhanced.

2.5.4 Other notable guidance, as set out in Smarter Travel – A Sustainable Transport Future – A New Transport Policy for Ireland 2009 – 2020, includes the encouragement of measures to integrate land use planning and transport planning in the interests of sustainable development.

Conclusions in relation to Regional Planning Policy

2.5.5 The Regional Planning Guidelines for the Greater Dublin Area estimate that the population of County Meath will increase by 20% between 2006 and 2016, and a further 7% between 2016 and 2022.

2.5.6 The RPG's designate the Navan Economic Growth Area, which includes Navan as the principal economic growth town, and which also includes the economic growth town of Kells and the town of Trim. Navan is identified as the County Town of Meath.

2.5.7 With regard to Kells, it is stated that potential exists to develop Kells as a tourism cluster. Ashbourne and Dunboyne are identified as 'Secondary Economic Growth Towns' and it is stated that the areas should be developed cognisant of their supporting role and settlement character within the region and relative to supporting physical, social, technical requirements and investments. The RPG's emphasise opportunities to focus growth associated with the rail line in Dunboyne. It is also stated that it is important that Ratoath should become more self sustaining in terms of providing employment opportunities locally. The influence of Drogheda, the southern environs of which is located within County Meath, on the GDA is noted in the RPG's, as is the strong comparison retail provision in Drogheda.

2.5.8 The Retail Planning Strategy for the Greater Dublin Area 2008 – 2016 sets out the retail hierarchy for the area. Navan is designated as a Level 2 Major Town Centre within the retail hierarchy in the Strategy. Navan is the only Level Two Major Town Centre in Meath. The Strategy identifies Dunboyne, Ashbourne, Dunshaughlin, Kells, Trim, Laytown/Bettystown, Enfield as Level 3 centres, which are town and/or district centres and sub-county town centres. Dunboyne is identified as a centre with the potential to grow to a Level 2 centre over a 20 year period.

2.5.9 The Retail Strategy also sets out a number of specific policy objectives for Meath which should be addressed, including:

- Continuing to support and develop the County Town of Navan as a predominantly comparison shopping based centre;
- 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;
- The facilitation and promotion of 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.

Conclusions in relation to Local Planning Policy

2.5.10 The Development Plans and Local Area Plans described above generally seek to encourage appropriate retail development in the town centre, where suitable lands are available.

2.5.11 Emphasis is also placed on the integration of development with transport nodes where relevant, such as in Dunboyne and Pace.

2.5.12 In this regard, the Development Plans and Local Area Plans seek to implement the policies and objectives at the national and regional level in terms of encouraging the development of the various centres in accordance with their position in the retail hierarchy and promoting the sequential approach to retail development.

2.5.13 The plans also address issues relating to public realm, car parking, traffic calming, etc.

CHAPTER 3: ECONOMIC CONTEXT & CURRENT RETAILING TRENDS

3.1 Introduction

3.1.1 In setting out the retail strategy for the County, it is important to assess the economic context, as relevant to retail, at a national, regional and local level as current and projected economic growth levels can have a significant effect on factors such as expenditure change and thus on the nature and quantum of retail development that occurs.

3.1.2 This section of the report therefore outlines the national, regional and local economic context. This section also sets out recent trends in retailing in Ireland which will influence future development. Retail trends are intrinsically linked to the economic context.

3.1.3 Sources for this section include the Central Statistics Office (CSO) publications, most notably the 2006 Census of Population and the Retail Sales Index, ESRI publications such as Quarterly Economic Commentary, the National Spatial Strategy, the Retail Planning Guidelines (2012), and the Regional Planning Guidelines for the Greater Dublin Area (2010 – 2022). The information relating to retail trends is sourced from a combination of in-house experience in retail development and a review of the relevant planning policy context.

3.2 National Context

3.2.1 The Irish economy experienced an unprecedented period of growth from the early 1990's to 2007. According to the ESRI[1], unprecedented economic growth saw the level of Irish real GDP double in size over the course of a little more than a decade.

3.2.2 However, the pace of economic growth began to decelerate in the second half of 2007. In 2008, output fell for the first time since 1983, and the recession deepened in 2009. Ireland's economic difficulties have been compounded by the global difficulties in financial markets which commenced in 2007.

3.2.3 With the decline in economic growth, came a decline in employment. From a peak of 2.1 million persons employed in 2007, an increase of 75% from 1990 and averaging a low unemployment rate of 4.5% in 2007, unemployment ~~as of November 2011~~ now stands at 14.5% of the population~~, 14.3% in December 2011~~[2].

3.2.4 According to the ESRI, the downturn post 2006 saw the public finances move into significant deficit at an alarming rate[3], with the General Government Deficit reaching 14% of GDP in 2009. The ESRI Quarterly Economic Commentary of Winter 2011 / Spring 2012 estimates that the general government deficit is -10.1% of the GDP in 2011 and is forecast to be at -8.6% in 2012.

3.2.5 As would be expected, retail sales have been affected by the downturn. The CSO February 2012 Retail Sales Index indicates that in January 2012 retail sales volumes, excluding the motor trade, declined by 2.7% year-on-year and the value of retail sales, excluding the motor trade, fell by 1.9% year-on-year%. Sale of clothing, footwear and food have however held up reasonably well in comparison with other sectors.

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[1] ESRI Current Trends, http://www.esri.ie/irish_economy/

[2] CSO Live Register Figures December 2011 (standardised unemployment rate)

[3] http://www.esri.ie/irish_economy/

~~3.2.6~~3.2.6 The ~~latest~~ ESRI Quarterly Economic Commentary (Winter 2011 / Spring 2012) estimates that the Irish economy returned to modest growth in 2011, with real GDP increasing by about 0.9 per cent. GDP growth for both 2012 is expected to be the same as 2011, at about 0.9%. It further estimates that GDP will increase by 2.3 per cent in 2013, and GNP will increase by 1.0 per cent. It is expected that growth will slow significantly in 2012. GDP in 2012 is expected to grow by 0.9 per cent, whereas GNP will contract by 0.3 per cent as export growth will not be enough to counterbalance weak domestic demand and government austerity.

3.3 Regional Context

Population

3.3.1 The preliminary results from the 2011 Census of Population suggest that the population of County Meath has increased by 13% since 2006, from 162,831 in 2006 to 184,034 in 2011.

3.3.2 The Regional Planning Guidelines for the Greater Dublin Area 2010 – 2022 estimate that the population of the Mid-East region is set to increase from 514,500 in 2008 to 594,600 in 2016 and 639,700 in 2022.

3.3.3 As demonstrated by Table 1 below, this anticipated growth rate is in exceedance of the State average and also that of the Dublin region.

Table3.1: RPG Population Projections for Dublin, Mid-East and State

Region	2008	2010	2016	2022	% Increase 2008 - 2022
Dublin	1,217,800	1,256,900	1,361,200	1,464,200	20.2
Mid-East	514,500	540,000	594,600	639,700	24
State	4,422,000	4,584,900	4,997,000	5,375,200	22

Source: Regional Planning Guidelines for the Greater Dublin Area 2010 - 2022

3.3.4 Specifically in relation to County Meath, population is estimated to increase from 162,831 in 2006 to 195,898 in 2016 and 210,260 in 2022.

3.3.5 These figures have not been substantially altered by the CSO Regional P~~p~~opulation Projections 2011 – 2018 (December 2008) which estimates that the population of the Mid-East is set to increase by 189,000 (39.2%) by 2026.

3.3.6 The table below shows the population of the key settlements (and environs) in the County in 2011 (Preliminary Census results)~~06~~. It also shows the percentage change in population between 2006~~2~~ and 2011~~06~~. ~~Preliminary Census of Population results for 2011 are not yet available for all of these settlements.~~

Table 3.2: Main Settlements Population (including Environs) 2006, 2011			
Settlement	**Persons 2006**	**Persons 2011**	**% Change**
Navan	24,851	28,559	13.0
Laytown-Bettystown-Mornington	8,978	10,889	17.5
Ashbourne	8,528	11,355	24.9
Trim	6,870	8,268	16.9
Dunboyne	5,713	6,959	17.9
Kells	5,248	5,888	10.9
Dunshaughlin	3,384	3,903	13.3
Drogheda Environs	9,574	11,966	20.0

Table 3.2: Main Settlements Population 2002, 2006			
Settlement	**Persons 2002**	**Persons 2006**	**Percentage change 2002-2006**
Navan Town	*3,406*	*3,710*	*8.9*
Environs of Navan	*16,011*	*21,141*	*32*
Navan Total	**19,417**	**24,851**	**28**
Laytown-Bettystown-Mornington	**5,597**	**8,978**	**60.4**
Ashbourne	**6,362**	**8,528**	**34**
Trim, Trim Town	*1,447*	*1,375*	*-5*
Trim, Trim Urban	*1,204*	*1,170*	*-2.8*
Environs of Trim	*4,447*	*5,495*	*23.6*
Trim	**7,098**	**8,040**	**13.3**
Dunboyne	**5,363**	**5,713**	**6.5**
Kells Town	*2,522*	*2,257*	*-10.5*
Kells Urban	*2,362*	*2,046*	*-13.4*
Kells Environs	*1,899*	*2,991*	*57.5*
Kells Total	**6,783**	**7,294**	**7.6**
Environs of Drogheda	**2,133**	**4,787**	**124.4**
Dunshaughlin	**3,063**	**3,384**	**10.5**

***Source:* For Drogheda Environs, CD114 of the Preliminary Census 2011. For all other locations, Table CD116 of the Preliminary Census 2011~~CSO 2006~~**

Age Profile

3.3.7 In terms of the age profile, the population of County Meath generally accords to the State averages. However, Meath County has a slightly above average number of persons in the 0 – 19 age bracket (29.9% compared to the State average of 27.2%) and in the 20 – 39 age bracket (34% compared to 32.7%).

3.3.8 This trend towards a slightly younger age profile in County Meath is reflected in the 60 – 84+ age bracket where the population of County Meath at 11.8% is well below the State average of 15.3%.

Table 3.3: Age Profile in County Meath and State, 2006				
Age Profile	**State**		**Meath**	
	Number	**Percentage**	**Number**	**Percentage**
0 - 4 years	302,252	7.1	14,228	8.7
5 - 9 years	288,325	6.8	12,800	7.9
10 - 14 years	273,872	6.5	11,122	6.8
15 - 19 years	290,257	6.8	10,605	6.5
20 - 24 years	342,475	8.1	11,356	7.0
25 - 29 years	373,078	8.8	14,131	8.7
30 - 34 years	349,361	8.2	15,485	9.5
35 - 39 years	322,105	7.6	14,382	8.8
40 - 44 years	301,329	7.1	12,493	7.7
45 - 49 years	274,745	6.5	10,370	6.4
50 - 54 years	247,068	5.8	8,927	5.5
55 - 59 years	225,328	5.3	7,764	4.8
60 - 64 years	181,727	4.3	6,144	3.8
65 - 69 years	143,396	3.4	4,168	2.6
70 - 74 years	119,152	2.8	3,315	2.0
75 - 79 years	92,466	2.2	2,432	1.5
80 - 84 years	64,884	1.5	1,791	1.1
85 years and over	48,028	1.1	1,318	0.8
Total	**4,239,848**	**100.0**	**162,831**	**100.0**

Source: CSO 2006

Social Class

3.3.9 The table below shows the number and percentage of people in County Meath and the State in terms of their social class. As can be seen, County Meath has an above average percentage of persons at work. Meath also has a lower percentage of people looking for their first job and of persons unemployed having lost or given up a previous job.

Table 3.4: Social Class in County Meath and State, 2006				
Category	**Meath**		**State**	
	Number	**Percentage**	**Number**	**Percentage**
At work	78,437	62.9	1,930,042	57.2
Looking for first regular job	846	0.7	29,372	0.9
Unemployed having lost or given up previous job	4,637	3.7	150,084	4.4
Student	10,771	8.6	349,596	10.4
Looking after home/family	15,428	12.4	387,014	11.5
Retired	10,347	8.3	377,927	11.2
Unable to work due to permanent sickness or disability	3,785	3.0	138,382	4.1
Other	430	0.3	12,982	0.4
Total	**124,681**	**100**	**3,375,399**	**100**

Source: CSO 2006

Occupation

3.3.10 In terms of occupation, the table below shows that County Meath has an above average percentage of persons employed, with 51% compared to the State average of 49.1%.

3.3.11 The largest employment sector in the County was the 'clerical, managing and government workers' category at 10%, above the State average of 8.6%. Other categories of occupation notably above the State average include 'manufacturing workers', 'building and construction workers', and 'communication and transport workers'.

3.3.12 Occupation in categories such as 'professional, technical and health workers', and 'service workers' are below State averages, although not to any significant degree.

3.3.13 It can be concluded that occupation in County Meath generally follows State trends. There is no apparent dominance of one or more occupations in the County.

Table 3.5: Occupation in County Meath and State, 2006

Category	Meath		State	
	Number	Percentage	Number	Percentage
Looking for first regular job	846	0.5	29,372	0.7
All occupations	83,074	51.0	2,080,126	49.1
Farming, fishing and forestry workers	3,518	2.2	88,414	2.1
Manufacturing workers	10,547	6.5	245,234	5.8
Building and construction workers	8,415	5.2	183,429	4.3
Clerical, managing and government workers	16,242	10.0	365,670	8.6
Communication and transport workers	5,333	3.3	114,919	2.7
Sales and commerce workers	10,824	6.6	284,164	6.7
Professional, technical and health workers	12,533	7.7	342,414	8.1
Services workers	8,184	5.0	224,964	5.3
Other workers (incl. not stated)	7,478	4.6	230,918	5.4
Total Population	162,831	N / A	4,239,848	N / A

Source: CSO 2006

Educational Attainment

3.3.14 The table below shows the educational attainment in Meath, compared to the State averages. The percentages are expressed in terms of the percentage of each category to the total population in County Meath and the State.

3.3.15 11.1% of the population in County Meath has a third level degree or higher qualification, compared to the 12.4% State average.

3.3.16 This trend may generally be attributable to the absence of a recognised third level facility in County Meath.

Table 3.6: Educational Attainment in County Meath and State, 2006

Category	Meath		State	
	Number	Percentage	Number	Percentage
Total whose full-time education has ceased	107,309	65.9	2,850,333	67.2
Primary (incl. no formal education)	16,170	9.9	514,085	12.1
Lower secondary	22,735	14.0	573,411	13.5
Upper secondary	33,299	20.5	803,498	19.0
Third level : non-degree	13,257	8.1	301,327	7.1
Third level : Degree or Higher	18,072	11.1	527,775	12.4
Not stated	3,776	2.3	130,237	3.1
Total whose full-time education not ceased	17,372	10.7	525,066	12.4
Total at school, university, etc	10,771	6.6	349,596	8.2
Other	6,601	4.1	175,470	4.1
Total Population	162,831	N / A	4,239,848	N / A

Source: CSO 2006

3.4 Retail Trends

3.4.1 It is important to be able recognise and respond to the key trends in retailing in formulating a retail strategy.The latest the CSO Retail Sales Index figures (February 2011) indicate that retail sales volumes, excluding the motor trade, are continuing to decline.

3.4.2 It is noteworthy that the level of increase/decline in retail sales has varied significantly between different categories of retail business since 2005. There has been a significant decline in the volume of sales in the bulky goods sector as illustrated within the in furniture and lighting category (69.7 i.e. reduction in 30.3% since 2005) and hardware, paints and glass category (79.2 a reduction of 20.8%). However, -electrical goods have an index of 142.8 in December 2011.

3.4.3 There is no composite figure for comparison goods, but it is clear that comparison goods expenditure on clothing and footwear is still well ahead of the level in 2005. The volume of sales index for department stores and clothing, footwear and textiles have also increased since 2005 to 117.6 (an increase in 17.6% since 2005) –and 116.6 (an increase in 16.9% since 2005) respectively. An increase of 12.5% has also been observed within the food business category since 2005.

~~3.4.4~~ Against this context, the retail market has shown signs of evolving to meet market demands and to increase attractiveness, evidenced for example by the integration of leisure and retail uses and the increase in retail unit size to create the required economies of scale to compete effectively in an increasingly competitive market. These issues are discussed in further detail below. In general terms, increased price competition has become a key retail issue in the current economic market and is currently the key trend driving the retail market.

3.4.4

3.4.5 Following an outline below of the key trends in convenience retailing, comparison retailing and retail warehousing, an outline will be provided of the notable trends in the retail sector since the economic recession in late 2007.

Convenience Retailing

Increase in Retail Unit Size

3.4.6 There has been a trend for the major convenience retailers to develop larger scale stores in recent years, notwithstanding the cap on convenience floorspace set out in the Retail Planning Guidelines 2012~~05~~ of 3,000 sq. m. net floorspace (4~~3~~,0~~5~~00 sq. m. in the Greater Dublin Area, and 3,500 sq.m for Cork, Limerick / Shannon, Galway and Waterford).

3.4.7 The~~ Draft~~ Retail Planning Guidelines (2012~~1~~) state that the average size of supermarkets in 2009 was 1,701 square metres; this is an increase of 3.7 % since 2004.

3.4.8 In line with this development, is an expansion in the range of goods now being sold in supermarkets, which has included an increase in the number of individual food and non-food convenience lines and the stocking of comparison goods such as clothing, books and cd's. This has resulted in the merging of comparison and convenience retailing within one store.

3.4.9 In the UK it has been estimated that supermarkets now allocate more than one third of their floor space to non-food sales[4].

3.4.10 This has implications for planning authorities who have traditionally distinguished between these formats in the formulation of retail policy. It also requires a more complex assessment of retail impact than would previously have been required. There has been a counter trend emerging recently in the provision of smaller convenience stores, including those developed by discounters, and the 'express' or 'metro' variation of the large supermarket operators. Examples of this trend include the 'Tesco Express' on Fairyhouse Road, Ratoath.

<u>Competition from Discounters</u>

3.4.11 The emergence of discount retailers, such as Aldi and Lidl, has been a notable trend over the past decade. The~~ Draft~~ Retail Planning Guidelines (2012~~1~~) indicate that Lidl has a market share of 5.5% and Aldi has a market share of 3.6%.

3.4.12 Discount retailers have significantly increased their number of stores in recent years and it is envisaged that their expansion programme will continue. In this regard, Aldi recently obtained permission for a second distribution centre in Mitchelstown, Cork which it is anticipated will serve their expanding network of stores in the country.

3.4.13 Within Meath, there is a developing distribution of discount foodstores, with Aldi stores in Drogheda, Navan, Kells, Ashbourne and Clonee and Lidl stores in Navan, Trim, Ashbourne and Clonee. In addition, there is a Buy Lo in Ashbourne. Dunboyne, Dunshaughlin and Enfield are notable absentees from this list.

~~3.4.14The Retail Planning Guidelines 2005 state that discount foodstores have a different trade draw to standard convenience retailers, however, the Guidelines also state that discount foodstore can also anchor neighbourhood centres, illustrating the wider role that these stores are playing in retail provision. This distinction is not carried through in the Draft Retail Planning Guidelines 2011.~~

<u>Concentration of Market Share</u>

~~3.4.15~~3.4.14 Analysis of the market share for convenience retailing in Ireland illustrates that the market is dominated by a limited number of retailers, such as Tesco, Dunnes Stores and Super Valu, notwithstanding the relatively recent emergence of discount foodstores such as Aldi, Lidl, and Buy Lo.

~~3.4.16~~3.4.15 The ~~Draft~~ Retail Planning Guidelines (2012~~1~~) state that Tesco has the largest share of the Irish retail market, followed by Dunnes Stores and Supervalu and that these three retailers account for 70.8 per cent of the Irish retail market.

~~3.4.17~~3.4.16 This trend is likely to continue in the future as the major players seek to increase their market share. These retailers have the advantage of greater economies of scale than their smaller scale competitors.

~~3.4.18~~3.4.17 It is also noticeable that many of these major retailers have introduced new formats to compete in the local convenience markets which provide top-up

[4] Department for Business, Innovation and Skills/Genecon and Partners (2011) *Understanding High Street Performance*

shopping as opposed to a weekly shopping (e.g. Tesco Local & Tesco Express, Superquinn Select, Marks and Spencer Simply Food).

~~3.4.19~~3.4.18 There has also been a noticeable development of convenience outlets attached to petrol service stations.

Farmer Markets and Ethnic Shops

~~3.4.20~~3.4.19 Farmer markets normally operate on a weekly basis and provide the opportunity for independent traders to sell a variety of fresh products such as fruit and vegetables, cheese, speciality breads, and sundry items such as olives, jams, chocolates, wine etc.

~~3.4.21~~3.4.20 Fairyhouse Market in Ratoath, operating on Sundays, is a significant attraction in the County. There are a number of other Farmers Markets operating throughout the County, notably Athboy Farmers Market operating on Sundays, Kells Market in Farrell Street, Navan Farmers Market in Navan Town Centre, and Sonairte Farmers Market in Laytown, all operating on Sundays.

~~3.4.22~~3.4.21 Another emerging trend is the increase in ethnic markets and stores specialising in ethnic products such as food, fashion and hair products.

Comparison Retailing

Larger Sized Units

~~3.4.23~~3.4.22 The trend for increased sized units evident in the convenience sector is replicated in the comparison shopping sector. This is most clearly seen in a visual comparison of the newest retail developments and those that are as little as 10 years old. It is also a feature of the newest brand multiples which have recently entered the Irish market.

~~3.4.24~~3.4.23 The trend for larger floorspace for comparison stores is for example illustrated in Opera Lane in Cork. H & M, Warehouse and Zara have all also opened flagship stores in Dublin City Centre in units with large floor plates. In the Jervis Street Centre Dublin, New Look opened their largest store in Europe and Forever 21 have also opened a new flagship store.

~~3.4.25~~3.4.24 This trend could potentially negatively impact on the ability of town and city centres to provide the required floorspace as the traditional built form of many town and city centres would not readily supply such units in a single property, thereby requiring often complex and time consuming, site assembly. New build shopping centres can represent a simpler and more cost effective way for new multiples requiring large units to enter the market. However, care must be taken to protect the vitality and vibrancy of the town centre.

International Multiples

~~3.4.26~~3.4.25 There is now a far greater presence of European and International multiples in the Irish retail market. Even within the last few years, the retail sector has seen the introduction of new brands into the country, e.g. H & M, New Look, Zara, Starbucks, Gap, Diesel and American Apparel. There are also a number of new entrants seeking to enter the market such as Old Navy, Banana Republic and Naf Naf. The introduction of these international multiples also indicates the demand for higher-order comparison goods in Ireland e.g. House of Fraser & Harvey Nichols.

~~3.4.27~~3.4.26 International retailers require larger size units. However, a side effect of the introduction of such international multiples is a degree of homogenisation of town and city centres, with a potential risk of eroding their inherent character. Independent retailers are an important part of the retail profile and create a sense of diversity and uniqueness to the retail environment.

Polarisation of Retail Development

~~3.4.28~~3.4.27 BCSC (British Council for Shopping Centres) (2004)[5] note that in recent years, multiple retailers have concentrated investment in the largest retail centres in order to maximise their catchment areas and achieve critical mass. The result is that a widening gap is being created between the larger centres and the remaining centres, especially for comparison shopping. This leads to an increasing leakage of trade from smaller centres to larger ones, with suburban and smaller metropolitan centres being particularly vulnerable.

~~3.4.29~~3.4.28 It will be important to ensure that the key towns within County Meath can counterbalance the increased attraction to surrounding centres such as Blanchardstown, Drogheda and Dublin City. This potential vulnerability will need to be addressed if the outflow of expenditure leakage is to be addressed.

Factory Outlet Centres

~~3.4.30~~3.4.29 The emergence of Factory Outlet Centres and Tourist Outlet Centres both within the Republic and in Northern Ireland has been a significant retail development in recent years. Centres such as Banbridge and Kildare Village Outlet Centre have proven to be successful and can attract custom from a wide catchment area.

~~3.4.31~~The Retail Planning Guidelines describe that such Centres involve the selling of products at discount prices in an individual factory shop usually located as part of or adjacent to the production facility and that *"proposals for individual factory shops may be appropriate, provided the scale of the shop ~~does not affect the viability of nearby town centres or raise significant traffic and transport issues~~is appropriate to its location ~~".~~*

3.4.30 *and raises no issues in relation to the vitality and viability of nearby urban centres".*

Home Shopping

~~3.4.32~~3.4.31 Parker[6] outlines how *"one of the major trends shaping Ireland's retail future is the rise of online shopping".* According to IMRG (2006)[7], 10% of all retail sales now take place online. The ~~Draft~~ Retail Planning Guidelines (2012~~1~~) state that it is clear that the proportion of sales made over the internet and mobile phones is increasing.

~~3.4.33~~3.4.32 Home shopping traditionally took the form of catalogue / mail order shopping but has now diversified into internet shopping and television shopping. This form of retailing is particularly suited to non bulky comparison goods, such as books,

5 BCSC (2004) Op cit.

6 Brophy C. Ireland's Shopping Meccas

7 IMRG (2006). Press release 24/5/2006. Accessed at www.imrg.org

CDs, DVDs, clothing. It is envisaged that the proportion of retailing carried out online is likely to increase in the coming years.

~~3.4.34~~3.4.33 Websites such as eBay have considerably extended the range and profile of internet shopping. In some instances, the internet has been used by traditional mail order service providers as a means of extending their range of customer service and providing a second means of shopping.

~~3.4.35~~3.4.34 However, Women's Fashion retailers are also increasingly selling on line and brands such as Top Shop, ASOS and Monsoon all offer on line purchasing opportunities.

~~3.4.36~~3.4.35 Online convenience retailing has also increased in popularity in recent years with food retailers such as Tesco providing this facility to consumers.

~~3.4.37~~3.4.36 Online shopping is beneficial to the consumer in so far as the consumer can readily see the prices of the products they wish to purchase prior to making the purchase. Internet shopping offers choice to consumers and enables them to have their groceries delivered to their door.

~~3.4.38~~3.4.37 The impact of online shopping on high street operators is becoming increasingly evident. Waterstones Book stores have closed a number of their stores citing online competition as the principle reason. HMV have also cited on line competition as a significant issue in terms of their future viability.

Retail Warehousing

~~3.4.39~~3.4.38 The pattern of retail warehousing is now well established in Ireland, with a growing trend for a concentration of warehouse units in retail parks. This form of retailing tends to be more reliant on private transport given the predominantly bulky nature of goods sold. It is frequently not suited to town centre sites owing to the need for a large site area to contain both the unit and the associated car parking.

~~3.4.40~~3.4.39 The Retail Planning Guidelines state that retail warehouse parks should not adversely impact on the vitality and viability of town centres provided that the range of goods sold in the units is restricted to bulky items, as defined in the Guidelines. ~~.~~

~~3.4.41~~3.4.40 It is noted that there is a recent trend towards broadening the range of goods sold in these parks, sometimes including convenience goods and large scale comparison shopping (e.g. Heaton's, Next~~, Argos~~). This could represent a potential threat to town centres as retail parks may be viewed as a more attractive location for new development, providing larger units and substantial car parking more easily than some town centre sites. This threat is recognised n the Retail Planning Guidelines 2012 which states: *"Due to the fact that the range of goods being sold from retail warehouse parks often includes non bulky durables, there is potential for a detrimental impact on city/town centres as indicated by the increasing number of vacant units in urban centres where retail parks exist on the periphery".*

~~3.4.42~~3.4.41 A notable trend evident in the UK is that the regulatory environment has not been sufficiently strong to avoid the negative effects on town and city centres of development of this type, particularly as a number of early retail parks have been transformed into 'fashion parks' or 'factory outlet centres', with the goods on sale often indistinguishable from those sold at a conventional 'High Street' location.

~~3.4.43~~3.4.42 In an Irish context, the Retail Planning Guidelines for the Greater Dublin Area (2008 – 2016) also reflect this issue, stating that:

"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".

~~3.4.44~~3.4.43 However, it is noted that Planning Authorities and in particular An Bord Pleanala are beginning to take a much more rigorous approach regarding the suitability of retail warehouse parks for certain types of retailing.

~~3.4.45~~3.4.44 As has been set out in Chapter 2 of this Strategy, the recently published ~~Draft~~ Retail Planning Guidelines (2012~~1~~) seek to respond to this issue by including an amended definition of 'bulky goods' which now includes *"household appliances" "catalogue shops"* and *"tools and equipment for the house and garden"*. ~~The Guidelines also make specific reference to '*ancillary items associated with an otherwise bulky good*' and state that such ancillary products '*should not exceed 15% of the total net retail floorspace*'.~~ The Guidelines emphasis that bulky goods are truly bulky goods or goods generally sold in bulk which are not portable by customers traveling by foot, cycle or bus.

Retailing Trends and the Impact of the Economic Recession

~~3.4.46~~3.4.45 The onset of the economic recession in late 2007 has led to a very significant slowdown in the physical development of the retail sector in the country. The effect of the economic conditions on retailer is evident in the increase in the presence of vacant and derelict sites in town centre locations.

~~3.4.47~~3.4.46 The changing context has required, and will continue to require, both innovation and realism in the development of the retail sector. Whilst the potential for large scale mixed use and town centre schemes has been reduced, some retailing sectors have remained relatively strong including the discount foodstore sectors.

~~3.4.48~~3.4.47 The convenience sector by its nature continues to attract a demand and continues to expand as a result albeit at a slower rate.

~~3.4.49~~3.4.48 The comparison sector has suffered a decline, as has the demand for retail warehousing, and both these sectors in particular will require innovation and investment to ensure that key centres retain their attraction. The expansion of the comparison sector in designated centres will be a key factor in seeking to retain expenditure and ensure sustainable patterns of development.

~~3.4.50~~3.4.49 Opportunities arising from the recession include the opportunity to consolidate and re-invent town centres. There are now opportunities to occupy existing vacant units in most, if not all, medium and large town centres and measures should be put in place to encourage the utilisation of such units. Town centre management, a concept that has been prevalent in the UK for many years but which has not been developed to any significant extent in Ireland, is likely to play an increasing role in ensuring the attractiveness, vitality and viability of town centres.

~~3.4.51~~3.4.50 Heritage and tourism towns remain well placed to attract visitors. Improving the public realm and environmental amenity of town centres to increase their attractiveness is also likely to be a factor in retaining expenditure and attracting visitors.

~~3.4.52~~3.4.51 It should be recognised that one of the residual effects of the recession has been a number of extant permissions for ambitious town centre redevelopment, often including significant retail provision, which are now unlikely to be implemented. Such permissions exist in towns such as Navan, Trim and Kells in County Meath.

~~3.4.53~~3.4.52 A pragmatic approach should be taken to such extant permissions, recognising that any implementation of such permissions is likely to be on a much reduced scale from that originally approved, and / or on a phased basis. The appropriate redevelopment and revitalisation of town centres lands should continue to be promoted.

3.5 Conclusion

Economic Trends

3.5.1 The preliminary results from the 2011 Census of Population suggest that the population of County Meath has increased by 13% since 2006, from 162,831 in 2006 to 184,034 in 2011.

3.5.2 The Regional Planning Guidelines for the Greater Dublin Area 2010 – 2022 estimate that the population of the Mid-East region is set to increase from 514,500 in 2008 to 594,600 in 2016 and 639,700 in 2022. Specifically in relation to County Meath, population is estimated to increase from 162,831 in 2006 to 195,898 in 2016 and 210,260 in 2022.

3.5.3 It has been shown that statistics for County Meath relating to age profile, social class, occupation and educational attainment generally accord with State averages.

3.5.4 However, some notable trends include Meath County having a slightly above average number of persons in the 0 – 19 age bracket (29.9% compared to the State average of 27.2%) and in the 20 – 39 age bracket (34% compared to 32.7%). This trend towards a slightly younger age profile in County Meath is reflected in the 60 – 84+ age bracket where the population of County Meath at 11.8% is well below the State average of 15.3%.

3.5.5 Other trends include County Meath displaying occupation in the 'clerical, managing and government workers' category at 10%, above the State average of 8.6%. Other categories of occupation notably above the State average include 'manufacturing workers', 'building and construction workers', and 'communication and transport workers'.

Retail Trends

3.5.6 In terms of retail trends, the retail market has continued to diversify to meet new and evolving demands, demonstrated by, for example, the linking of retail and leisure facilities, larger floorplates and extended opening hours. Such evolution and diversification will need to continue into the future to combat the continued decline in retail sales and increased competition from international retailers in both the comparison and convenience markets.

3.5.7 The recent trends in retailing should be taken into account in the formulation of a Retail Strategy. At the same time, care will need to be taken to ensure that town centres retain dominance in terms of retailing, particularly against the potential threat of retail parks and large out of centre stores competing directly with town centres in terms of products and goods on sale.

3.5.8 Opportunities for development in and adjoining town centres, particularly where such opportunities would accommodate the demand for increased floorplates, should be encouraged, as should innovation in the retail trade, including the integration of retail and leisure land uses. Trends in retail warehousing will need to be examined carefully, particularly the impact of the tightening of enforcement of the sale of non-bulky goods from retail warehouse parks.

3.5.9 In summary, there is a requirement to ensure that the key centres in County Meath are placed in a strong position to continue to perform an essential function in terms of providing for the retail needs of their communities and surrounding communities. The provision of appropriately located retail services and facilities and an appropriate quantum and type of retail service can make a positive contribution in this regard.

3.5.10 The onset of the economic recession in late 2007 has led to a general stagnation in the physical development of the retail sector in the country. Whilst convenience retailing has continued to develop, most notable through national and international multiples with large floorplates, the comparison sector in particular has suffered. There has been a general decline in the vitality and viability of town centres.

3.5.11 The changing context has required, and will continue to require, both innovation and realism in the development of the retail sector. Opportunities arising from the recession include the opportunity to consolidate and re-invent town centres. A pragmatic approach must be taken in relation to extant permissions for large town centre redevelopment and it should be recognised that any implementation of such permissions is likely to be on a much reduced scale from that originally approved, and / or on a phased basis.

CHAPTER 4 – SURVEY APPROACH AND ANALYSIS

4.1 INTRODUCTION

4.1.1 In order to establish the baseline data for the retail study, it was necessary to undertake a number of qualitative and quantitative surveys. These included:

- Review and Update of the Floor Space Survey contained within the 2008 Retail Strategy for the Greater Dublin Area;
- Survey of vacant units within each of the identified towns;
- Household Survey undertaken by Demographics Ireland;
- Shoppers Survey undertaken by Demographics Ireland;
- Consultation with the Chamber of Commerce & key stakeholders within each of the main towns in County Meath.

4.1.2 A brief description of each of the surveys carried out, identification of the methodology utilised in undertaking the surveys and the key survey results are set out below. Details of the survey of vacant units within each of the main towns of the County are set out within Chapter 5 of the Retail Strategy.

4.2 FLOOR SPACE SURVEY

4.2.1 The 2008 Retail Strategy for the Greater Dublin Area sets out a breakdown of existing convenience, comparison and bulky retail warehousing floorspace within the County. These figures have been updated and reviewed in the preparation of the current retail strategy by Meath County Council. The planning register was utilised to determine the extent of retail floorspace that has been permitted since the 2008 Retail Strategy for the Greater Dublin Area.

4.2.2 It should be noted that for the purpose of this study, the floor areas relate to the net retail floor area. Net retail floorspace is defined in the Retail Planning Guidelines (2012) as:

~~*"The area of a shop or store that is devoted to the sale of retail goods (including the area devoted to checkouts)".*~~

"The area within the shop or store which is visible to the public and to which the public has access including fitting rooms, checkouts, the area in front of the checkouts, serving counters and the area behind used by serving staff, areas occupied by retail concessionaires, customer service areas, and internal lobbies in which goods are displayed, but excluding storage areas, circulation space to which the public does not have access to, cafes, and customer toilets".

4.2.3 Therefore any ancillary spaces such as offices, store rooms etc. are excluded from the net floorspace figure. Where register information detailed the gross floor area of a development, the net floor area of the development was estimated based on the nature of the retail floorspace proposed.

Classification

4.2.4 Annex 1 of the 2012~~1~~ ~~Draft~~ Retail ~~Retail~~ Planning Guidelines provides clear guidance on how to classify convenience, comparison and bulky goods. The floorspace survey categorised the different retail units in accordance with the following definitions as set out within the 2012 Retail Planning Guidelines:

Convenience:

- Food;
- Alcoholic and non alcoholic beverages;
- Tobacco;
- Non durable household goods[1].

4.2.5 All supermarkets, newsagents, chemists and retail food outlets (excluding fast food takeaways, restaurants and cafes) were included in this category.

Comparison

- Clothing and footwear;
- Furniture, furnishings and household equipment (excluding non-durable household goods);
- Medical and pharmaceutical products, therapeutic appliances and equipment;
- Educational and recreation equipment and accessories;
- Books, newspapers and magazines;
- Goods for personal care;
- Goods not elsewhere classified;
- Bulky goods.

Bulky Household Goods

4.2.6 While the bulky goods category is listed under the classification of comparison floorspace above it is considered appropriate to make a distinction within the Retail Strategy between pure comparison floorspace and bulky household goods.

4.2.7 Goods generally sold from retail warehouses where DIY goods or goods such as flat pack furniture are of such a size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that a large area would be required to display them e.g. repair and maintenance materials; furniture and furnishings; carpets and other floor coverings, household appliances, tools and equipment for the house and garden, bulky nursery furniture and equipment including perambulators, bulky pet products such as kennels and aquariums, audio visual, photographic and information processing equipment, catalogue shops and other bulky durables for recreation and leisure.

4.2.8 Floorspace figures as set out within the 2008 Retail Strategy for the Greater Dublin Area have been updated by Meath County Council and through visual inspections throughout the County. A summary of the existing floorspace survey for the County is provided in Table 4.1 below.

[1] Small scale household goods bought on a regular basis i.e. cleaning products.

Table 4.1: Existing Floorspace within County Meath	
Convenience	40,099 sq.m.
Comparison	40,284 sq.m.
Bulky Goods	53,403 sq.m.

4.3 HOUSEHOLD SURVEY

4.3.1 The household survey is key in determining the existing shopping patterns in the County for different retailing types including clothing, footwear, food and household goods. The results of this survey are important to obtain an understanding of the levels of outflows and retention of expenditure within the County.

Methodology

4.3.2 A comprehensive survey of households in County Meath was undertaken in December 2011 by Demographics Ireland, an independent survey company. The objective of this study was to establish the existing shopping patterns within the County.

4.3.3 In preparing this survey regard was had to the existing breakdown of the County provided within the 2008 Retail Strategy for the Greater Dublin Area. The County is split into 3 separate zones within the Regional Retail Strategy, namely Zone 14 (north west of the County including Kells, Oldcastle and Nobber), Zone 15 (central and eastern portion of the county including Navan, Ashbourne, Dunboyne, Dunshaughlin and Ratoath) and Zone 16 (south western portion of the County including Athboy, Trim and Enfield) as illustrated in Figure 4.1 below.

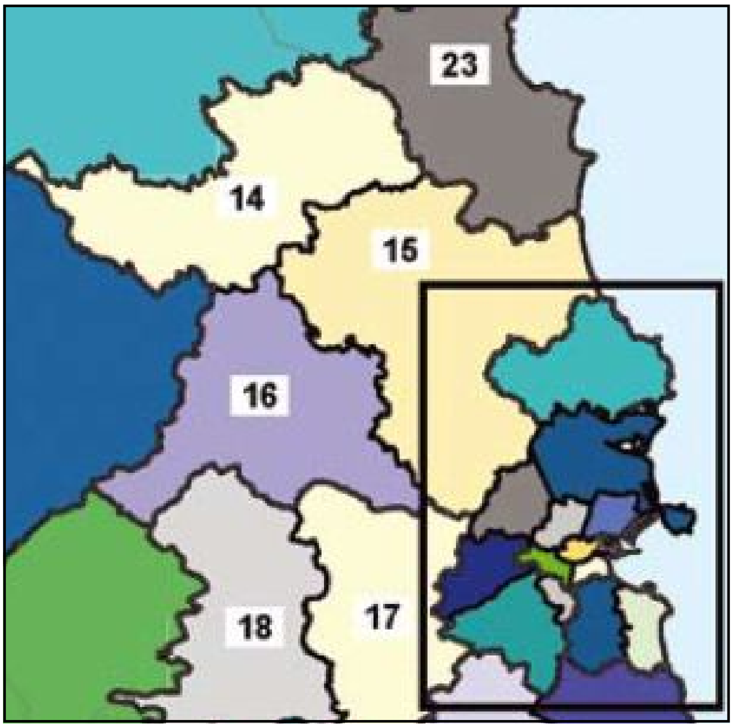


Figure 4.1: Extract from figure E.1 of Retail Strategy for the Greater Dublin Area illustrating breakdown of County in zones

4.3.4 It was considered that there are advantages associated with using a similar zone breakdown as that set out within the GDA Retail Strategy including in particular the identification of key changes within the retail patterns in the County between 2007 and 2011. Zones 14 and 16 as set out within the retail strategy have been reinstated for the purposes of the household survey. It was considered appropriate to split Zone 15 into 3 smaller settlements (as indicated by the dashed lines on the attached map) due to the overall size of this area (121,386 persons within the 2011 preliminary census).

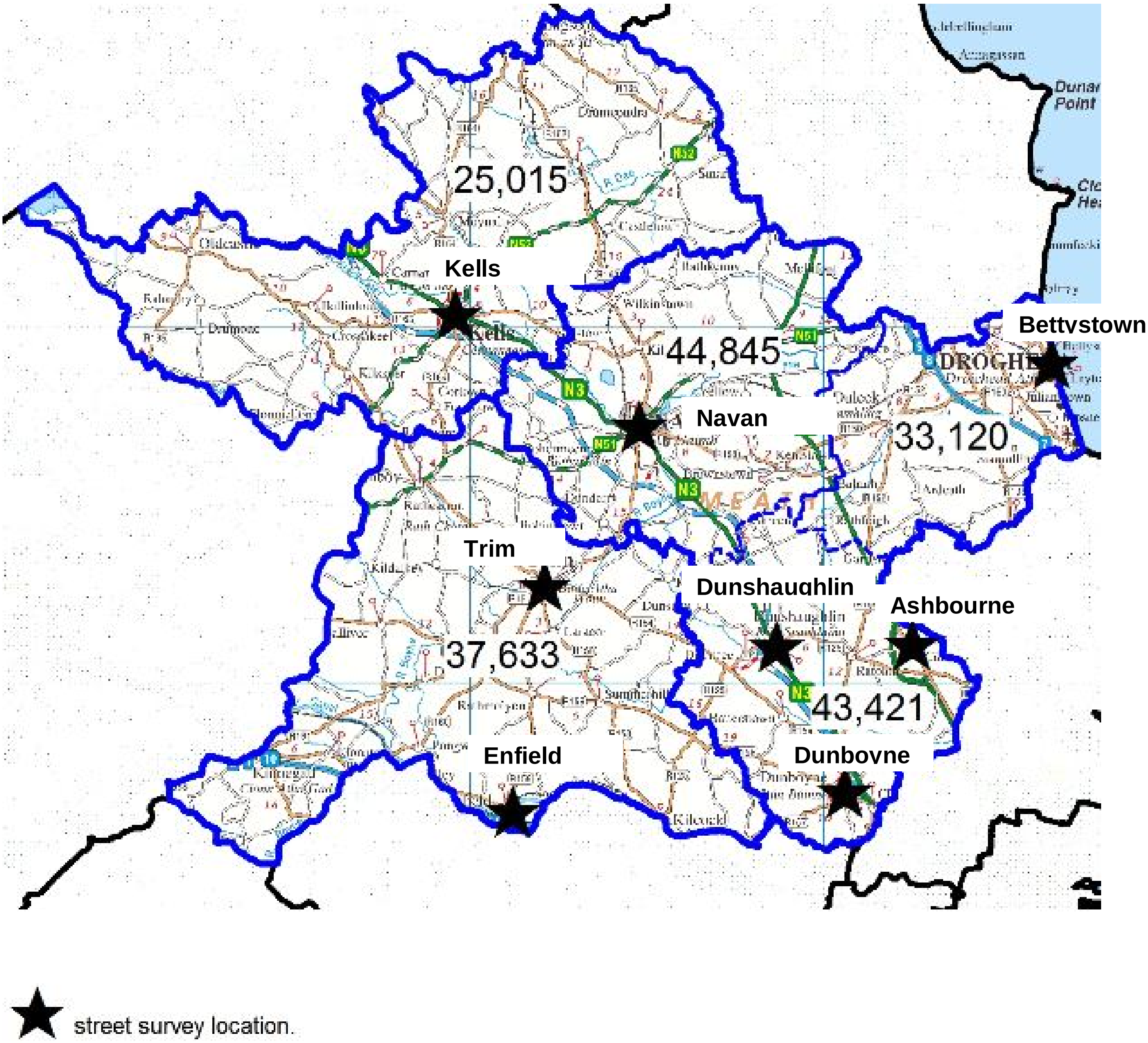


Figure 4.2: Zone Breakdown of County Meath for the Household Survey
Source: Demographics Ireland 2011

4.3.5 A total of 500 household surveys were undertaken for the purposes of this study. The number of questionnaires undertaken within each of these 5 areas was determined based on pro rata population split as set out within the Table 4.2 overleaf.

Table 4.2: Settlement Population Breakdown						
		Zone 15			Zone 16	Zone 14
	Total	Navan	Bettystown	Ashbourne	Trim	Kells
2011 Population		44,845	33,120	43,421	37,633	25,015
% of County Population		24%	18%	24%	20%	14%
No of Surveys allocated	500	120	90	120	100	70

4.3.6 A summary of key results which are considered of particular relevance is provided below.

4.3.7 The survey obtained personal information regarding the gender, age and home address of the respondents. ~~A total of 500 of respondents were interviewed.~~

Survey Questions

4.3.8 The household survey primarily contained questions relating to where the respondents carry out their main food shopping, top up shopping, bulky household shopping and clothing and footwear shopping. The survey also included other useful information such as the mode of transport used for shopping trips and the frequency of shopping trips to centres outside of the County. A summary of the results is provided below.

Main Food Shopping

4.3.9 Respondents were asked *"Regarding your household food and grocery shopping, where do you go to normally carry out your main food and grocery shopping, or do you shop on the internet for your main food and grocery shopping?".*

4.3.10 Table 4.3 lists the principal shops used for convenience shopping within the catchment area. The results illustrated in Table 4.4 below illustrate the significant degree of retention of convenience expenditure within the County, with 77.7% of respondents within the administrative boundary of Co. Meath carrying out their main food and grocery shopping within the County.

Table 4.3: Main Food Shopping Location						
		Zone 15			Zone 16	Zone 14
	Co. Meath	Navan	Bettystown	Ashbourne	Trim	Kells
Base	489*	118	90	116	95	70
Navan	26.18%	90.68%	1.11%	0.86%	9.47%	14.29%
Kells	7.36%				1.05%	50%
Trim	10.43%	0.85%		0.86%	51.58%	
Ashbourne	15.75%		4.44%	62.93%		
Dunshaughlin	2.04%			8.62%		
Bettystown	4.91%		26.67%			
Drogheda (Co. Meath)	3.27%		17.78%			
Oldcastle	2.04%					14.29%
Ratoath	1.23%			5.17%		
Clonee	0.41%			1.72%		
Other within Meath	4.09%	0.85%	2.22%		13.68%	5.71%
Total Within Meath	**77.71%**	**92.37%**	**52.22%**	**80.17%**	**75.79%**	**84.29%**
Drogheda	7.77%	3.39%	37.78%			
Maynooth	4.29%			9.48%	10.53%	
Ardee	1.23%					8.57%
Clones	0.61%			2.59%		
Kilcock	0.41%				2.11%	
Kinnegad	0.20%				1.05%	
Other Outside Meath	7.77%	4.24%	10.00%	7.76%	10.53%	7.14%
Total Outside County Meath	**22.29%**	**7.63%**	**47.78%**	**19.83%**	**24.21%**	**15.71%**

* non responses excluded

4.3.11 As illustrated on Table 4.3 above, convenience retention levels vary significantly throughout the various catchment areas identified within the study. The Navan survey area, for example, retains over 92% of convenience expenditure compared with the Bettystown area which retains just 52%. The survey results also demonstrate that while Navan retains a high market share within its immediate catchment area, this centre does not provide a significant attraction for convenience retailing for other centres within the county i.e. only 9.5% of respondents from the Trim area and 14.3% of respondents from the Kells area travel to Navan for their main food and grocery shopping.

4.3.12 It is noteworthy that a breakdown of these results between the separate settlements within the County illustrate that the key factor in determining the attraction of centres outside of Co. Meath is geographical proximity. Drogheda acts as a significant attraction for convenience expenditure outside the catchment area particularly for residents within the Bettystown area with over 37% of respondents from the Bettystown catchment area travelling to Drogheda for their main food and grocery shopping. This figure excludes respondents who carry out their main food shopping in Drogheda Environs Co. Meath. 17.8% of respondents from the Bettystown area travel to the Drogheda Environs area for their main food and grocery shopping. The proximity of Drogheda to the Bettystown area is the key determinant which would attract these customers to this area for their main food and grocery shopping. Likewise Maynooth acts a significant attraction for residents within the Trim area with over 10% of respondents from this area travelling to Maynooth for their main food and grocery shopping. This compares with 9.5% of respondents from the Trim area who travel to Navan for this purpose. It is noted that Dunboyne is not listed as a centre where respondents carry out their main food shopping. This is reflective of the lack of large ~~conveneince~~convenience retail units within the centre. Existing convenience retail units within Dunboyne include a Eurospar and a Daybreak store. These retail units serve a convenience "top-up" role rather than as units where people undertake their main food and grocery shopping.

4.3.13 Respondents were asked to state their main reason for shopping at the store/location where they carry out their main food and grocery shopping. It is clear that the key determinant in this instance is geographical proximity with 41.8% of respondents stated "*close to home*" as being their main reason in determining the location of where they carry out their convenience shopping. 21.8% of respondents referred to "*good value for money*" and 9.8% cited "*wide choice of goods*".

Table 4.4: Main Reason for Shopping at Main Food / Grocery Location

		Zone 15			Zone 16	Zone 14
	Co. Meath	Navan	Bettystown	Ashbourne	Trim	Kells
Base	500	120	90	120	100	70
Close to Home	41.8%	26.7%	46.7%	40.8%	45.0%	58.6%
Good value for money	21.8%	28.3%	16.7%	24.2%	24.0%	10.0%
Wide choice of goods	9.8%	6.7%	10.0%	10.0%	11.0%	12.9%
Ease of Parking	8.8%	18.3%	8.9%	5.8%	6.0%	1.4%
Other	6.2%	5.8%	3.3%	10.0%	1.0%	11.4%
Good quality products	5.4%	5.8%	3.3%	7.5%	7.0%	1.4%
Parking cheap/free	3.6%	4.2%	10.0%	1.7%		2.9%
Close to other shops	1.6%	3.3%			3.0%	1.4%
Close to work	0.8%	0.8%			3.0%	
Good public transport	0.2%		1.1%			

4.3.14 Respondents were also asked how frequently they carry out their main food and grocery shopping. 69% of respondents stated that they carried out their main food and grocery shopping "once a week", 14% stated "twice a week", 5% of respondents carry out their shopping on a daily basis and 11% of respondents stated that they carried out their main food and grocery shopping either "once a fortnight" or "once a month". 1% of respondents noted that they carry out their main food and grocery shopping "whenever needed".

4.3.15 94.6% of respondents surveyed travel by car, whether they are the driver or just passenger, to do their main food shopping. 3% either walk or cycle, 1.2% of respondents noted that they travel by taxi, 0.4% travel by bus and 1% have their shopping delivered.

Convenience Satisfaction Rating

4.3.16 Respondents were asked if they were satisfied with where they carry out their main food and grocery shopping. The responses to this question displayed a high level of satisfaction, with 84.6% of respondents stating that they were either "very satisfied" or "satisfied" with where they carry out their main food and grocery shopping.

Table 4.5: Convenience Satisfaction Level

	Co. Meath	Navan	Bettystown	Ashbourne	Trim	Kells
Base	500	120	90	120	100	70
Very Satisfied	46%	55%	31.1%	37.5%	43%	68.6%
Satisfied	38.6%	23.3%	56.7%	40.8%	48%	24.3%
Neither Satisfied or Dissatisfied	4%	-	7.8%	6.7%	2%	4.3%
Not Satisfied	9.2%	20.8%	2.2%	11.7%	3%	2.9%
Very Dissatisfied	2.2%	0.8%	2.2%	3.3%	4%	-

4.3.17 Of the respondents who stated that they were either dissatisfied or very dissatisfied with where they carry out their main convenience shopping 40% stated that these goods were “too expensive”, 23% referred to “poor range of goods”, 20% referred to “parking problems” and 3.3% referred to “poor shopping environment”.

Top Up Shopping

4.3.18 Respondents were asked where they carry out their main “top-up” shopping. The results illustrated in Table 4.6 below show how the majority of respondents (95%) undertake their main top up shopping within the County. This high level of retention of expenditure is reflective of the nature of this form of shopping with over 50% of respondents stating that they undertake their main “top-up” shopping within local symbol stores such as Spar and Centra.

Table 4.6: Top-Up Shopping Location						
		Zone 15			Zone 16	Zone 14
Base	Co. Meath	Navan	Bettystown	Ashbourne	Trim	Kells
	470*	108	86	117	89	70
Local Shop (Co. Meath)	50.64%	44.44%	51.16%	46.15%	67.42%	45.71%
Navan	11.91%	50.93%			1.12%	
Kells	6.38%				1.12%	41.43%
Ashbourne	5.96%		1.16%	23.08%		
Trim	5.32%	1.85%			25.84%	
Bettystown	4.26%		23.26%			
Dunshaughlin	3.83%	0.93%		14.53%		
Ratoath	3.19%			12.82%		
Drogheda (Co. Meath)	2.55%		13.95%			
Oldcastle	1.06%					7.14%
Total within Meath	**95.11%**	**98.15%**	**89.53%**	**96.58%**	**95.51%**	**94.29%**
Drogheda	1.91%	0.93%	9.30%			
Ardee	0.64%					4.29%
Kilcock	0.43%				2.25%	
Kinnegad	0.21%				1.12%	
Other outside Meath	1.70%	0.93%	1.16%	3.42%	1.12%	1.43%
Total Outside Meath	**4.89%**	**1.85%**	**10.47%**	**3.42%**	**4.49%**	**5.71%**

* non responses excluded

4.3.19 The most popular form of transport used for top up shopping was by car, with 70.6% of respondents noting that they drive or are passengers in a car when carrying out their top up shopping. 27.2% of respondents walk reflecting the classification of the most popular location for “top-up” shopping at a local store. 0.2% of respondents get public transport, 0.8% cycle and 1% of respondents noted that they have their top up shopping delivered.

4.3.20 In terms of the frequency of top up shopping, 26.8% of respondents stated that they visit a store for top up purposes on a daily basis, 56.2% of respondents noted that they do a top-up shop approximately 2 to 4 times a week. 15.4% of respondents carry out their top up shopping once a week and 0.6% carry out their top up shopping once a fortnight or less often and the remaining 1% of respondents stated that they “never” undertake top-up shopping.

Comparison Shopping

4.3.21 Respondents were asked which town, shopping centre, retail location or shop they would normally visit for their main clothes and footwear purchases.

4.3.22 The results to this question demonstrate a significant level of leakage of comparison expenditure from the County to competing centres, as illustrated in Table 4.7 overleaf, with 58.9% of respondents carrying out their main comparison shopping at locations outside of the County. However, this level of leakage is not reflected in all areas within the county. Navan retains 71.8% of comparison expenditure within its catchment area and there are significant inflows of comparison expenditure from Trim and Kells as illustrated on Table 4.7 below.

4.3.23 Dublin acts as a significant attraction for comparison shopping with over ~~35,.6%~~ 35.6% of respondents stating that they visited this area for their main clothing and footwear shopping (i.e. combination of Dublin City, Swords and Blanchardstown). Blanchardstown is a particular draw attracting 24.4% of respondents. 16.3% of respondents surveyed stated that they undertook their main clothes and footwear shopping within Drogheda.

Table 4.7: Main Comparison Shopping Location

		Zone 15			Zone 16	Zone 14
	Co. Meath	Navan	Bettystown	Ashbourne	Trim	Kells
Base	491*	117	89	119	96	70
Navan	34.2%	70.1%	1.1%	9.2%	37.5%	54.3%
Ashbourne	2.9%	-	-	11.8%	-	-
Trim	1.0%	-	-	-	5.2%	-
Kells	1.0%	-	-	-	-	7.1%
Other places in Meath	2.0%	1.7%	-	-	3.1%	7.1%
Meath Total	**41.1%**	**71.8%**	**1.1%**	**21%**	**45.8%**	**68.6%**
Dublin City	9.6%	8.5%	4.5%	15.1%	12.5%	4.3%
Swords	1.6%	-	6.7%	1.7%	-	-
Blanchardstown	24.4%	12.8%	6.7%	60.5%	18.8%	12.9%
Drogheda	16.3%	5.1%	78.7%	0.8%	1.0%	2.9%
Other places outside Meath	6.9%	1.7%	2.2%	0.8%	21.9%	11.4%
Outside Meath, Total	**58.9%**	**28.2%**	**98.9%**	**79%**	**54.2%**	**31.4%**

Note: *Table excludes non responses

4.3.24 Table 4.7 above demonstrates how the responses to this question vary significantly throughout the catchment area depending on the location and proximity to a competing centres with 77.3% of respondents from within the Ashbourne survey area in Zone 15 carrying out their main comparison shopping within Dublin, while over 78.7% of the respondents from the Bettystown survey area of zone 15 undertake their main comparison shopping in Drogheda.

4.3.25 Respondents were asked to state their main reasons for shopping at the store/location where they carry out their main clothing and footwear shopping. The results are presented in Table 4.8 overleaf 33.4% of respondents referred to "wide choice of goods", 32.4% referred to "proximity to home" and 14% stated "good value for money". The survey results indicate that respondents are willing to travel outside of the County for their main clothes and footwear shopping to avail of a more varied product range. This significantly differs from the major reason identified for where people carry out their main food and grocery shopping which is based on geographical proximity.

Table 4.8: Main Reason for Shopping at Clothes/Footwear Location						
		Zone 15			Zone 16	Zone 14
	Co. Meath	Navan	Bettystown	Ashbourne	Trim	Kells
Base	500	120	90	120	100	70
Wide choice of goods	33.4%	24.2%	23.3%	42.5%	33.0%	47.1%
Close to Home	32.4%	33.3%	43.3%	26.7%	24.0%	38.6%
Good value for money	14.0%	13.3%	13.3%	10.8%	24.0%	7.1%
Good quality products	10.8%	22.5%	4.4%	7.5%	12.0%	2.9%
Ease of Parking	3.6%	1.7%	8.9%	4.2%	1.0%	2.9%
Parking cheap/free	3.0%	3.3%	4.4%	3.3%	3.0%	-
Close to other shops	1.8%	-	1.1%	3.3%	3.0%	1.4%
Close to Work	0.8%	1.7%	1.1%	0.8%	-	-
Good public transport	0.2%	-	-	0.8%	-	-

4.3.26 The majority of respondent's surveyed (87%) travel by car to do their main clothing/footwear shopping. 4.2% of respondents walk and 8.0% take the bus.

4.3.27 When asked how frequently they carry out their clothes and footwear shopping 10% of respondents stated that they shop for clothes every week to fortnight, 34.6% stated every month to 2 months, 26% stated every 3 months, 16.4% stated every 6 months, 7.6% stated as required, 3.4% stated "once a year" and 2.0% stated "other".

Comparison Satisfaction Rating

4.3.28 Respondents were asked if they were satisfied with where they carry out their main comparison shopping. The responses to this question displayed a high level of satisfaction, with 76.8% of respondents stating that they were either "very satisfied" or "satisfied" with where they carry out their main clothes and footwear shopping.

Table 4.9: Comparison Satisfaction Levels						
	Total	Navan	Bettystown	Ashbourne	Trim	Kells
	500	120	90	120	100	70
Very Satisfied	37.20%	37.50%	31.10%	18.30%	44.00%	67.10%
Satisfied	39.60%	27.50%	63.30%	36.70%	44.00%	28.60%
Neither Satisfied nor Dissatisfied	5.00%	5.00%	3.30%	5.80%	7.00%	2.90%
Not Satisfied	16.60%	27.50%	2.20%	36.70%	3.00%	1.40%
Very Dissatisfied	1.60%	2.50%	-	2.50%	2.00%	-

4.3.29 The responses to this question varied –throughout the catchment area as illustrated in Table 4.9 above with 94.4% of respondents from the Bettystown area, 88% of respondents from the Trim area and 95.7% of respondents from the Kells area stating that they were either "very satisfied" or “satisfied” with where they carry out their main comparison shopping. This compares to 65% of respondents from Navan and 55% of respondents within the Ashbourne.

4.3.30 Of the respondents who stated that they were either dissatisfied or very dissatisfied with where they carry out their main –comparison shopping 63.7% referred to “poor range of goods”, 23.1% cited “too expensive”, 2.2% referred to “parking problems” and 1.1% of respondents referred to the “poor shopping environment”.

Bulky Goods Shopping

4.3.31 Question 14 of the household survey requested respondents to identify where they carried out their main bulky goods shopping. The definition of bulky goods was split between furniture and electrical goods within the questionnaire as many people would shop at different locations for these goods. The results are illustrated in Tables 4.10 and 4.11.

Table 4.10: Bulky Goods Furniture Location

		Zone 15			Zone 16	Zone 14
	Co. Meath	Navan	Bettystown	Ashbourne	Trim	Kells
Navan	41.6%	78.2%	3.4%	33.7%	34.1%	51.6%
Oldcastle	1.8%	-	-	-	-	12.5%
Trim	8.3%	0.9%	-	1.2%	38.8%	1.6%
Ashbourne	1.2%	-	-	5.8%	-	-
Kells	0.9%	2.7%	-	-	-	1.6%
Drogheda (Meath)	10.2%	1.8%	44.3%	2.3%	1.2%	-
Others in Meath	3.5%	4.5%	3.4%	5.8%	-	3.1%
Meath Total	**67.4%**	**88.2%**	**51.1%**	**48.8%**	**74.1%**	**70.3%**
Dublin	10.6%	4.5%	9.1%	25.6%	9.4%	4.7%
Blanchardstown	5.5%	2.7%	-	19.8%	2.4%	3.1%
Swords	1.8%	-	3.4%	5.8%	-	-
Drogheda (Louth)	7.6%	2.7%	34.1%	-	-	-
Mullingar	1.8%	-	-	-	9.4%	-
Others outside Meath	5.1%	1.8%	2.3%	-	4.7%	21.9%
Total Outside Meath	**32.6%**	**11.8%**	**48.9%**	**51.2%**	**25.9%**	**29.7%**

* Table excludes non responses

Table 4.11: Bulky Goods Electrical Location						
		Zone 15			Zone 16	Zone 14
	Co. Meath	Navan	Bettystown	Ashbourne	Trim	Kells
Base	472	118	85	107	92	70
Navan	33.7%	84.7%	1.2%	5.6%	21.7%	45.7%
Oldcastle	2.8%	-	-	-	-	18.6%
Trim	9.5%	-	-	1.9%	46.7%	-
Ashbourne	3.4%	-	1.2%	14.0%	-	-
Kells	2.1%	-	-	-	-	14.3%
Drogheda (Meath)	14.8%	3.4%	70.6%	2.8%	1.1%	2.9%
Others in Meath	1.9%	1.7%	-	3.7%	3.3%	-
Meath Total	**68.2%**	**89.8%**	**72.9%**	**28.0%**	**72.8%**	**81.4%**
Dublin	5.1%	-	1.2%	12.1%	9.8%	1.4%
Blanchardstown	14.6%	2.5%	-	52.3%	8.7%	2.9%
Swords	1.5%	-	1.2%	5.6%	-	-
Drogheda (Louth)	6.6%	6.8%	24.7%	0.9%	-	1.4%
Mullingar	1.3%	-	-	-	6.5%	-
Others outside Meath	2.8%	0.8%	-	0.9%	2.2%	12.9%
Total Outside Meath	**31.8%**	**10.2%**	**27.1%**	**72.0%**	**27.2%**	**18.6%**

* Table excludes non responses

4.3.32 The results illustrated in Tables 4.10 and 4.11 illustrate that on average there is an approximate leakage of 45% of bulky goods expenditure from the catchment area.

4.3.33 The results vary significantly between the different areas within the catchment. Navan retains a significant proportion of bulky goods expenditure within its catchment with over 88.2% of respondents carrying out their main furniture shopping at this location and 89.8% of respondents carrying out their main shopping for electrical items within the town. This trend is reflective of the level of bulky warehouse floorspace which has been developed in the town in recent years and the tradition of furniture manufacturing in the town.

4.3.34 Drogheda acts as a key attraction for bulky goods expenditure, for both furniture and electrical goods purchases particularly for residents within the Bettystown area, while Blanchardstown exerts a significantly influence within the Ashbourne area.

4.3.35 Respondents were asked to state their main reasons for shopping at their main bulky goods shopping locations. The results are illustrated in Table 4.12 overleaf. The main reasons were cited as “good value for money” (26.6%) and “close to home” (26.4%).

Table 4.12: Main Reason for Shopping at Bulky Goods Location						
		Zone 15			Zone 16	Zone 14
	Co. Meath	Navan	Bettystown	Ashbourne	Trim	Kells
Base	500	120	90	120	100	70
Good value for money	26.6%	24.2%	24.4%	30.0%	27.0%	27.1%
Close to Home	26.4%	23.3%	36.7%	22.5%	28.0%	22.9%
Wide choice of goods	15.4%	11.7%	22.2%	11.7%	21.0%	11.4%
Good service and after sales support	6.6%	10.8%	2.2%	2.5%	3.0%	17.1%
Good quality products	6.2%	8.3%	4.4%	7.5%	7.0%	1.4%
Do not require items	6.2%	5.8%	1.1%	11.7%	5.0%	5.7%
Support local Business	4.6%	5.0%	4.4%	5.0%	3.0%	5.7%
Other	4.4%	5.8%	1.1%	6.7%	1.0%	7.1%
Ease of Parking	1.6%	2.5%	2.2%	-	2.0%	1.4%
Parking cheap/free	0.6%	0.8%	-	-	2.0%	-
Good public transport	0.6%	0.8%	1.1%	0.8%	-	-
Close to Work	0.4%	0.8%	-	0.8%	-	-
Close to other shops	0.4%	-	-	0.8%	1.0%	-

4.3.36 The majority of respondent's surveyed (52.6%) have their bulky goods shopping delivered. 45% travel by car (either as driver or passenger) to carry out their bulky goods shopping and 0.4% get a taxi and 0.2% walk.

4.3.37 The majority of respondents' 61.8%' carry out their main bulky goods shopping "once a year" and a further 19.2% stated "once every six months". 0.6% stated "once a fortnight", 1.2% stated "once a month", 1.2% stated "once every two months", 2.6% stated "once every three months" and 6.2% carry out their main bulky goods shopping "as required".

Bulky Goods Satisfaction Rating

4.3.38 Respondents were asked if they were satisfied with where they carry out their shopping for bulky goods. The responses to this question displayed a high level of satisfaction, with 85% of respondents stating that they were either "very satisfied" or "satisfied" with where they carry out their main bulky goods shopping.

Table 4.13: Bulky Goods Satisfaction Rating						
		Navan	Bettystown	Ashbourne	Trim	Kells
	500	120	90	120	100	70
Very Satisfied	44.40%	63.30%	28.90%	19.20%	47.00%	71.40%
Satisfied	40.60%	20.80%	65.60%	47.50%	45.00%	24.30%
Neither Satisfied or Dissatisfied	4.40%	5.00%	3.30%	7.50%	2.00%	2.90%
Not Satisfied	8.40%	8.30%	1.10%	22.50%	3.00%	1.40%
Very Dissatisfied	2.20%	2.50%	1.10%	3.30%	3.00%	-

4.3.39 Of the respondents who stated that they were either dissatisfied or very dissatisfied with where they carry out their main comparison shopping 56.6% referred to "poor range of goods", 26.4% cited "too expensive", 3.8% of respondents referred to the "poor shopping environment" 1.9% referred to "distance" and 1.9% referred to "poor access roads".

Competing Centres

4.3.40 Given the location of Meath and its proximity to a number of large competing centres, respondents were asked if they shop in competing centres such as Dublin City Centre, Drogheda, Blanchardstown and Maynooth and the frequency of visits and the nature of visits to these centres. The results are illustrated in Table 4.14 overleaf.

4.3.41 Blanchardstown was cited as the most frequented centre from residents within the County with over 48.2% of all respondents stating that they visited this centre for shopping purposes. Dublin City Centre also exerts a significant influence with over 31.4% of respondents stating that they had visited this centre for shopping purposes. 15.4% of all respondents noted that they travel to Liffey Valley for shopping purposes and 12% of all respondents travel to Swords. By comparison with other centres in Dublin, Dundrum does not attract as many customers from the Meath area.

4.3.42 The breakdown of responses between the various geographical areas is considered significant when assessing the above results, with 70% of respondents from the Ashbourne area and 65% of respondents from the Trim area travelling to Blanchardstown, compared to just under 19% of respondents from the Bettystown area who travel to this centre. Outside of Dublin, over 52% of respondents from the Bettystown area travel to Drogheda.

Table 4.14: Visits to Competing Centres						
Area	Total	Navan	Bettystown	Ashbourne	Trim	Kells
Dublin City Centre	31.4%	22.5%	32.2%	48.3%	33.0%	14.3%
Blanchardstown	48.2%	39.2%	18.9%	70.0%	65.0%	40.0%
Liffey Valley	15.4%	8.3%	2.2%	19.2%	39.0%	4.3%
Dundrum S.C.	7.6%	8.3%	13.3%	5.8%	6.0%	4.3%
Swords	12.0%	1.7%	30.0%	21.7%	4.0%	1.4%
Drogheda	25.0%	37.5%	52.2%	15.8%	9.0%	7.1%
Dundalk	3.4%	3.3%	6.7%	1.7%	1.0%	5.7%
Maynooth	7.2%	1.7%	-	17.5%	13.0%	-
Newry	10.4%	9.2%	11.1%	17.5%	5.0%	7.1%
Belfast	0.6%	-	1.1%	0.8%	1.0%	-
Elsewhere in Ireland	5.6%	1.7%	3.3%	6.7%	13.0%	2.9%
Outside Ireland	0.4%	-	-	1.7%	-	-

4.3.43 It should be noted that the total percentage presented in the above table, will not add up to 100% as a number of respondents listed more than one competing centre.

4.3.44 Residents were also asked to state their frequency of visits to competing centres such as Dublin City Centre, Blanchardstown, Liffey Valley, Dundrum etc. The results are illustrated in Table 4.15 below. The results again reflect the pull of Blanchardstown and Drogheda as competing centres. 32.8% of the respondents who visit Drogheda travel to this centre once a week. 17% of the respondents noted that they visited this centre once a week and a further 10.8% of respondents visit Blanchardstown once a fortnight.

Table 4.15: Frequency of Visits to Competing Centres					
Area	Once a Week	Once a fortnight	Once a month	Once or twice a year	Only Once
Dublin City Centre	15.3%	5.1%	24.8%	31.8%	22.9%
Blanchardstown	17.0%	10.8%	32.4%	24.9%	14.9%
Liffey Valley	7.8%	2.6%	36.4%	32.5%	20.8%
Dundrum S.C.	2.6%	2.6%	7.9%	31.6%	55.3%
Swords	3.3%	10.0%	35.0%	26.7%	25.0%
Drogheda	32.8%	9.6%	19.2%	24.8%	13.6%
Dundalk	23.5%	5.9%	17.6%	41.2%	11.8%
Maynooth	33.3%	11.1%	22.2%	19.4%	13.9%
Newry	3.8%	1.9%	13.5%	46.2%	34.6%
Belfast	-	-	-	33.3%	66.7%
Elsewhere in Ireland	7.1%	-	21.4%	42.9%	28.6%
Outside Ireland	-	-	50.0%	50.0%	-

4.3.45 It should be noted that the total percentage presented in the above table, will not add up to 100% as a number of respondents listed visit more than one competing centre.

4.3.46 Respondents were then asked to determine the nature of their visits to competing centres in terms of whether it was for food, clothes or bulky goods purchases. The results are illustrated in Table 4.16 below.

Table 4.16: Nature of Visits to Competing Centres							
Area	**% of respondents who visit the centre**	**Nature of Visits to Competing Centres**					
		Food and Grocery		**Clothes and Footwear**		**Bulky Household Goods**	
Dublin City Centre	31.4%	3	1.9%	147	93.6%	7	4.5%
Blanchardstown	48.2%	23	9.5%	203	84.2%	15	6.2%
Liffey Valley	15.4%	6	7.8%	64	83.1%	7	9.1%
Dundrum S.C.	7.6%	1	2.6%	35	92.1%	2	5.3%
Swords	12.0%	10	16.7%	41	68.3%	9	15.0%
Drogheda	25.0%	40	32.0%	63	50.4%	22	17.6%
Dundalk	3.4%	4	23.5%	13	76.5%	-	-
Maynooth	7.2%	26	72.2%	9	25.0%	1	2.8%
Newry	10.4%	25	48.1%	24	46.2%	3	5.8%
Belfast	0.6%	2	66.7%	1	33.3%	-	-
Elsewhere in Ireland	5.6%	4	14.3%	22	78.6%	2	7.1%
Outside Ireland	0.4%	-	-	2	100.0%	-	-

4.3.47 These results illustrate the attraction of competing centres such as Dublin City Centre and Blanchardstown for comparison shopping with 93.6% of respondents who visited Dublin City and 84.2% of respondents who visited Blanchardstown saying that they visited these centres for comparison shopping purposes. Drogheda also acts as a significant attraction for both convenience and comparison shopping. Only Swords and Drogheda get spread across all categories although a smaller relative number than~~t~~ Blanchardstown and Dublin City Centre.

Comparison with Trends Observed from the 2008 Retail Strategy for the Greater Dublin Area

4.3.48 Table 4.17 overleaf presents the key expenditure retention results for convenience, comparison and bulky goods of the survey undertaken in 2007 to inform the 2008 GDA Retail Strategy and compares these with the results obtained from the household telephone survey undertaken by Demographics Ireland to inform this current Retail Strategy.

Table 4.17: Market Share Comparison with Trends observed from 2008 GDA Retail Strategy				
Convenience				
	Zone 14	Zone 15	Zone 16	Total
2008 GDA Survey	69%	72%	65%	70.1%
Existing Trends	84%	77%	76%	77.7%
Comparison				
	Zone 14	**Zone 15**	**Zone 16**	
2008 GDA Survey	49%	43%	49%	45%
Existing Trends	68.6%	33%	45.8%	41%
Bulky Goods				
	Zone 14	**Zone 15**	**Zone 16**	
2008 GDA Survey	45%	55%	56%	53.8%
Existing Trends	75.8%	64%	73%	67.8%

Convenience Expenditure Trends

4.3.49 The information outlined in Table 4.17 above illustrates how retention of convenience expenditure retention has increased within each zone within the catchment area since 2008 with Kells experiencing the greatest growth over the period (15%). This is reflective of the development of additional convenience floorspace in the catchment area since 2008.

4.3.50 At the time of the 2008 survey Blanchardstown acted as key locations for convenience goods expenditure outside of the County with 7% of all respondents from Zone 15 travelling to this centre. The 2008 survey results also illustrated the attraction of Maynooth as a centre for convenience shopping with 14.6% of respondents from Zone 16 travelling to this centre and 7.5% of respondents from Zone 15 travelled to Drogheda for their main food shopping. When compared with the results from the survey undertaken by Demographics Ireland to inform the existing retail strategy, Blanchardstown is not specifically listed as a centre for main food shopping, 10% of respondents from Zone 16 travel to Maynooth and 11.7% of respondents from zone 15 travel to Drogheda.

Comparison Expenditure Retention Trends

4.3.51 Leakage of comparison expenditure to centres outside of the County remains particularly high across the County, from Zone 15 in particularly where it has increased from 57% to 67% since the 2008 survey has been undertaken. When zone 15 is further subdivided, as illustrated on Table 4.7 above, it is clear that Drogheda acts as a significant attraction for comparison shopping for residents in the Bettystown area with over 78% of respondents from this area travelling to this centre and 60.5% of respondents from the Ashbourne area travelling to Blanchardstown. By contrast Navan retains 71.8% of expenditure within its catchment. Navan is therefore demonstrating the sub regional role befitting a Level II centre in attracting expenditure from other

~~neighboring~~neighbouring catchment areas.

4.3.52 Comparison expenditure retention has increased by 20% within Zone 14, the Kells area since the 2008 retail strategy. The current survey results illustrate how over 54% of respondents from this area now travel to Navan for their main clothing and footwear shopping an increase from 47% in 2008. A higher proportion of respondents within this area are now carrying out their main clothing and footwear shopping within Kells, an increase from 1.17% in 2008 to 7.1% in 2011.

Bulky Goods Expenditure Trends:

4.3.53 Table 4.17 illustrates how bulky goods expenditure retention has increased significantly in most areas within the catchment area since 2008, an increase from 45% to 75.8% in zone 14 since 2008 and from 56% to 73% in Zone 16 over the same time period. An increase from 55% in 2008 to 64% in 2011 is observed within Zone 15. When this zone is split subdivided between the individual settlements as illustrated in Table 4.10 and 4.11 above it becomes clear that the main expenditure leakage is from the Ashbourne area to Blanchardstown and from the Bettystown area to Drogheda. This trend is not surprising given the proximity of these competing centres to Ashbourne and Bettystown. The Navan area by comparison maintains a high level of bulky goods expenditure within its catchment, reflecting the significant amount of bulky goods floorspace which has been developed within the County in recent years. Navan also acts as a significant attraction for expenditure from the Kells and Trim catchment areas.

Household Survey Conclusion

4.3.54 The household survey covered the topics of convenience, comparison, top up and bulky household goods shopping. It revealed that there is a significant degree of retention of convenience expenditure within County Meath with over 77% of all respondents carrying out their main food and grocery shopping within the county. This trend was attributed to the important factor of geographical proximity.

4.3.55 As is the case with other towns within the GDA, Navan has a relatively high market share of retail expenditure from its immediate catchment area. However the centre has a limited penetration across centres to the south and east of the County due to the proximity and draw of competing centres such as Blanchardstown, Dublin City and Drogheda.

4.3.56 On the whole, respondents were satisfied with the existing convenience retail provision within the county. This was reflected in the small percentage of leakage from the County.

4.3.57 The results of the household survey demonstrate a high level of leakage of comparison goods expenditure from the County (57.8%) to competing centres such as Blanchardstown and Drogheda. Blanchardstown is favoured for the purchase of clothes and footwear outside the county. The leakage is fuelled by the demand by consumers for a wider choice of products.

4.3.58 The retention of bulky goods expenditure has significantly increased since the 2008 GDA Retail Strategy for the Greater Dublin Area with 67.8% of this expenditure being retained within the County.

4.3.59 Blanchardstown has an influential pull on shopping trends, with the centre being named as the most frequented competing centre outside of County Meath. The majority of trips generated to Blanchardstown, Dublin City and Liffey Valley are for comparison goods shopping. The results of the household survey demonstrate a requirement for an increase in the variety and range of comparison stores provided within the County. This would help reduce the leakage to external centres.

4.4 SHOPPER'S SURVEY

4.4.1 The purpose of the shopper survey is to provide a profile of the people who visit the main towns in County Meath for shopping purposes. The shopper's survey helps to analyse the shopping patterns of people who visit Meath from outside the County and determine inflows to the County. It also provides an opportunity to ascertain more qualitative feedback from respondents on what they would determine as the key attractions and improvements needed to a particular centre.

Methodology

4.4.2 The shopper's survey was undertaken in Navan, Kells, Trim, Enfield, Dunboyne, Dunshaughlin, Laytown/Bettystown and Ashbourne on the 25th and 26th of November 2011. The shopper's survey was carried out by Demographics Ireland and included a street interview with 500 respondents. 150 surveys were undertaken in Navan and 50 were undertaken in each of the other listed settlements.

4.4.3 Surveys were not carried out over bank holiday weekends or during festivals, as these may have distorted normal shopping patterns. A summary of the results is provided below.

Classification

4.4.4 The survey obtained personal information regarding the gender, age and home address of the respondents. 41% of all respondents were male and 59% were female. All respondents to the survey were over the age of 18. The age group breakdown of all respondents is illustrated in Table 4.18 below.

Age Group Classification		
Age Group	No. of persons	%
18-24	57	11.4%
25-34	110	22%
35-44	115	23%
45-54	97	19.4%
55-64	67	13.4%
65-74	44	8.8%
75+	8	1.6%

Table 4.18: Age Group Classification

Survey Questions

4.4.5 The principle questions in the shopper's survey were as follows:

- Where the respondent came from?
- Main purpose of trip to town in which survey was being undertaken?
- Main mode of travel to town in which survey was being undertaken?
- Frequency of visits to relevant town to shop?
- Main reasons for travelling to town in which survey was being undertaken?
- The main shopping centres/shopping streets frequented in the town in which survey was undertaken?
- The main attractions of the town?
- What improvements are needed in the town?

4.4.6 A summary of the survey results is provided as follows:

Where respondents were from?

4.4.7 A key finding of the shopper's survey is the proportion of expenditure drawn from non study area respondents. The majority of respondents interviewed (96.2%) were from County Meath. 2.2% of respondents were from Dublin, 0.8% of respondents were from Kildare and 0.8% of respondents were from Cavan.

Table 4.19: Where are you from

Where are you from?									
	Base	Ashbourne	Bettystown	Dunboyne	Dunshaughlin	Enfield	Kells	Navan	Trim
	500	50	50	50	50	50	50	150	50
Navan	25.00%	4%	-	-	6%	-	2%	79.30%	-
Trim	11.20%	-	-	-	-	2%	2%	3.30%	98%
Dunshaughlin	10.20%	2%	-	2%	92%	-	-	2%	-
Bettystown	10.00%	-	100%	-	-	-	-	-	-
Dunboyne	8.60%	-	-	84%	2%	-	-	-	-
Kells	8.00%	-	-	2%	-	-	74%	0.70%	2%
Ashbourne	7.40%	74%	-	-	-	-	-	-	-
Enfield	6.80%	-	-	-	-	68%	-	-	-
MH Kells District	2.00%	-	-	-	-	-	18%	0.70%	-
MH Ratoath	1.60%	16%	-	-	-	-	-	-	-
MH Slane	1.40%	-	-	-	-	2%	-	4%	-
MH North County	1.20%	-	-	-	-	-	2%	3.30%	-
MH Longwood	1.00%	-	-	-	-	10%	-	-	-
MH Trim District	0.80%	-	-	-	-	-	-	2.70%	-
MH Rathmolyon	0.60%	-	-	-	-	6%	-	-	-
MH Clonee	0.40%	-	-	4%	-	-	-	-	-
Total within Meath	**96.20%**	**96%**	**100.00%**	**92%**	**100%**	**88.00%**	**98.00%**	**96.00%**	**100.00%**
Cavan	0.80%	-	-	-	-	-	2%	2%	-
KE County Kildare	0.80%	-	-	-	-	8%	-	-	-
Dublin Blanchardstown	0.60%	-	-	4%	-	-	-	0.70%	-
Dublin Swords	0.40%	4%	-	-	-	-	-	-	-
Dublin Clonsilla	0.40%	-	-	4%	-	-	-	-	-
Dublin Not Specified	0.40%	-	-	-	-	2%	-	0.70%	-
Dublin Lucan	0.20%	-	-	-	-	-	-	0.70%	-
KE Leixlip	0.20%	-	-	-	-	2%	-	-	-
Total outside Meath	**3.80%**	**4.00%**		**8.00%**		**12.00%**	**2.00%**	**4.10%**	**-**

Method of Travel

4.4.8 65.4% of respondents surveyed stated that they had travelled to the centre via car, 28.2% of respondents walked, 5% got a bus, 1.0% travelled to the centre on bicycle.

4.4.9 The prominence of the car as the main mode of transport varied across the catchment area i.e. 86% of the respondents within Dunshaughlin stated that they travelled to this centre via car compared to just 54% of respondents within the Dunboyne area.

Method of Transport									
	Base	Ashbourne	Bettystown	Dunboyne	Dunshaughlin	Enfield	Kells	Navan	Trim
	500	50	50	50	50	50	50	150	50
Car	65.4%	60%	70%	54%	86%	66%	62%	65.3%	60%
Walk	28.2%	18%	30%	44%	12%	22%	36%	26.7%	40%
Bus	5.0%	18%	-	-	2%	8%	-	7.3%	-
Bicycle	1.0%	2%	-	-	-	4%	2%	0.7%	-
Motorcycle	0.2%	2%	-	-	-	-	-	-	-
Other	0.2%	-	-	2%	-	-	-	-	-

Table 4.20: Method of Transport

Frequency of Visits

4.4.10 Respondents were asked how frequently they visit the centres within Meath to shop or look around the shops. The results are illustrated in Table 4.21 below. 50.4% of the total respondents stated that they visit the centre more than 3 times a week. A further 25.6% of all respondents visit the centre twice a week and 17.4% visit the centre once a week.

Frequency of Visits to each Centre									
	Base	Ashbourne	Bettystown	Dunboyne	Dunshaughlin	Enfield	Kells	Navan	Trim
	500	50	50	50	50	50	50	150	50
More than 3 times a week	50.40%	50%	20%	64%	68%	62%	46%	40%	74%
Twice a week	25.60%	20%	58%	24%	10%	14%	20%	32.70%	12%
Once a week	17.40%	26%	20%	10%	16%	14%	16%	19.30%	14%
2-3 times a month	3.20%	4%	2%	2%	4%	6%	6%	2.70%	-
Once a month	1.80%	-	-	-	2%	2%	8%	2%	-
Once every two months	0.60%	-	-	-	-	-	2%	1.30%	-
Less Often	1%	-	-	-	-	2%	2%	2%	-

Table 4.21: Frequency of Visits to Each Centre

Main Reason for Visiting the Centre

4.4.11 Respondents were asked their main purposes for their trip to each centre. The results are illustrated in Table 4.22 overleaf. 47.3% of all respondents stated that their main reason for visiting the centre was for their main grocery shopping, a further 11.9% of respondents stated that they were in the town centre for other grocery shopping.

4.4.12 Only 3.2% of respondents interviewed were in town centre for clothes and footwear shopping. This trend is reflective of the high level of comparison expenditure leakage from the County as identified in the household survey. The response rate to this varied throughout the catchment area with none of the respondents within the Kells, Enfield, Trim or Dunshaughlin areas visiting these centres for clothing or footwear shopping purposes. This compares to 8.9% of respondents within the Navan area who were carrying out clothes and footwear shopping.

Table 4.22: Main Reason for Shopping in Each Centre

		Ashbourne	Bettystown	Dunboyne	Dunshaughlin	Enfield	Kells	Navan	Trim
	495	50	50	49	50	50	50	146	50
Main Grocery Shop	47.3%	52%	66%	22.4%	70%	18%	76%	47.3%	26%
Work here	15.2%	24%	-	6.1%	4%	54%	4%	13.7%	18%
Other Grocery Shop	11.9%	6%	16%	44.9%	14%	-	6%	6.8%	12%
Banking/Financial Services	7.7%	2%	10%	6.1%	2%	6%	2%	6.8%	28%
Live here	4.2%	8%	-	-	6%	22%	-	0.7%	4%
Browsing round shops	2.2%	-	-	-	-	-	-	7.5%	-
Toiletries/Chemist	1.6%	-	2%	4.1%	-	-	8%	0.7%	-
Business	1.4%	-	-	4.1%	-	-	-	1.4%	6%
Clothes - Womens	1.2%	-	2%	-	-	-	-	3.4%	-
Clothes - Mens	1.2%	-	-	-	-	-	-	4.1%	-
Hair/Beauty	1.2%	-	-	-	2%	-	2%	1.4%	4%
Baby Items	1%	-	4%	-	-	-	-	2.1%	-
Eating Out	1%	4%	-	-	-	-	2%	1.4%	-
Drinking/Visiting pub	1%	2%	-	6.1%	2%	-	-	-	-
Clothes - Childrens	0.6%	2%	-	-	-	-	-	1.4%	-
Furnishing/household	0.4%	-	-	4.1%	-	-	-	-	-
Electrical Goods	0.4%	-	-	-	-	-	-	1.4%	-
Footwear	0.2%	-	-	2%	-	-	-	-	-
DVDs/CDs	0.2%	-	-	-	-	-	-	-	2%

Other Reasons for Shopping in Each Centre

4.4.13 Respondents were then asked if they had any other reasons for visiting each town centre. 26% of respondents stated that they were shopping for clothes and footwear, 13% of respondents were visiting a cinema/theatre, 14% of respondents were on business, and 19.8% of respondents work within the town centre.

Shopping Areas Frequented in Navan

4.4.14 Respondents within Navan were asked to identify which areas and streets they visited on their trip to the town. The results are illustrated in Figure 4.3 below. The results clearly demonstrate the prominence of Navan Shopping Centre with 60.7% of respondents visiting this centre. Other popular locations included Navan Town Centre 33.3% and Dunnes Stores 14%.

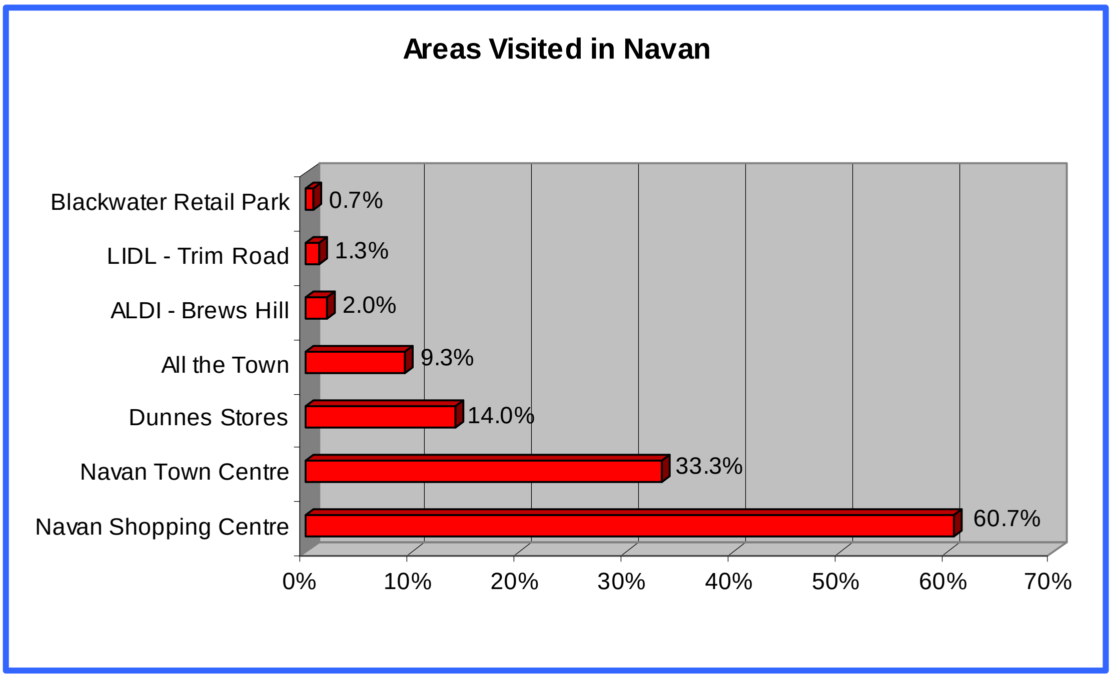


Figure 4.3: Areas Visited in Navan

Main Attractions of the town centre

4.4.15 Respondents were asked to identify what they felt were the main attractions of each centre. “Close to home”, “parking free” and “easy to get there by car” were ranked as the top 3 attractions to each centre as illustrated in Table 4.23 overleaf.

Main Attractions to each Centre									
		Ashbourne	**Bettystown**	**Dunboyne**	**Dunshaughlin**	**Enfield**	**Kells**	**Navan**	**Trim**
Base	500	50	50	50	50	50	50	150	50
Close to Home	80.80%	78%	98%	88%	92%	76%	72%	74%	82%
Parking free	26.60%	48%	30%	14%	66%	44%	60%	0.70%	2%
Easy to get to by car	25.60%	8%	52%	50%	36%	12%	22%	14.70%	32%
Close to Work	17.40%	24%	6%	16%	12%	26%	20%	16.70%	20%
Good choice of places to eat/drink	13%	16%	-	14%	-	24%	8%	15.30%	22%
Ease of Parking	12.20%	12%	24%	4%	18%	16%	-	11.30%	14%
Good choice of department/variety stores	11.60%	44%	-	6%	2%	28%	4%	10.70%	-
Safe environment	9.80%	8%	2%	10%	8%	22%	6%	7.30%	20%
Attractive shopping environment	7.20%	12%	-	-	16%	4%	2%	9.30%	10%
Good shopping malls	7%	2%	-	-	-	4%	4%	20%	-
Don't know	6.20%	6%	-	-	6%	12%	4%	3.30%	24%
Easy to get to by bus	4.60%	8%	-	-	6%	4%	-	8%	4%
Good choice of clothing and footwear shops	5%	2%	-	2%	-	-	2%	11.30%	10%
Good choice of cheap/discount shops	3%	4%	-	6%	-	2%	4%	3.30%	4%
Pedestrianised streets	2.80%	-	2%	10%	-	2%	-	3.30%	4%
Particular store	2.80%	-	2%	10%	-	2%	-	3.30%	4%
No reason	2.40%	-	-	-	-	2%	2%	4.70%	6%
Good facilities for children	1.80%	-	-	-	-	-	-	6%	-
Keeps jobs local	1.60%	-	-	2%	12%	-	-	-	2%
Good choice of quality/designer shops	1.40%	-	-	4%	2%	2%	-	2%	-
Particular store - SuperValu	1.40%	-	-	-	8%	-	6%	-	-
Other	1.40%	2%	-	4%	-	2%	2%	1.30%	-
People friendly	1.40%	2%	-	2%	2%	6%	2%	-	-
Good variety/quality	0.80%	-	-	-	4%	-	-	-	4%
Good facilities for the disabled	0.40%	2%	-	-	-	-	-	0.70%	-

Table 4.23: Main Attractions to Each Centre

Suggested Improvements

4.4.16 Respondents were asked to identify what improvements would encourage them to shop in each town centre on a more regular basis. A range of improvements are listed by the respondents with issues such as “more shops”, “free parking” and “improvement to parking”, ranking highly. In total 58.4% of respondents identified the requirement for “more shops” within the County i.e. combination of more shops, shopping malls and boutiques. The requirement for more shops was particularly prevalent within Navan and Bettystown as illustrated within Table 4.24 overleaf.

Suggested Improvements to each centre									
		Ashbourne	Bettystown	Dunboyne	Dunshaughlin	Enfield	Kells	Navan	Trim
Base									
More shops	32.80%	16%	90%	14%	44%	24%	46%	16.70%	44%
Free Parking	30.20%	2%	2%	8%	4%	2%	2%	67.30%	80%
Improve the Parking	26.60%	8%	-	48%	14%	38%	14%	36%	36%
Other	22.40%	14%	24%	42%	20%	32%	34%	15.30%	12%
More Shopping Malls/Centres	19%	28%	58%	6%	14%	24%	6%	6%	36%
More events	15%	40%	-	-	16%	32%	10%	12.70%	14%
More cafes and restaurants	11.20%	8%	28%	2%	8%	8%	18%	13.30%	-
More leisure facilities	8.80%	20%	2%	2%	12%	16%	10%	7.30%	4%
Nothing	9.40%	8%	-	16%	28%	2%	22%	4%	6%
Better Public Transport	10%	12%	4%	2%	-	3%	-	15.30%	6%
Improved car access	8.20%	-	-	-	2%	8%	4%	21.30%	4%
More Designer shops/boutiques	6.60%	16%	12%	2%	8%	4%	2%	4.70%	8%
Improve cleanliness	6.80%	6%	12%	-	4%	-	2%	12%	8%
Don't know	6.20%	14%	-	4%	16%	-	4%	4.70%	10%
Improvements to the streetscape/environment	5.40%	4%	-	10%	12%	-	-	4%	16%
More public toilets	5%	4%	-	-	4%	8%	14%	6%	2%
More cash machines	3.80%	16%	-	-	-	14%	-	1.30%	4%
More seating areas/amenities	4%	14%	-	-	12%	6%	2%	2%	-
Improved security	2.60%	2%	-	-	2%	18%	-	0.70%	2%
More facilities for disabled	3.40%	16%	-	-	2%	4%	2%	3.30%	-
More gyms/health clubs	2.40%	2%	2%	-	6%	4%	6%	0.70%	2%
More pedestrianised streets	2.20%	2%	2%	4%	2%	-	-	3.30%	2%
Crêche	1.20%	-	2%	-	-	8%	-	0.70%	-

Table 4.24: Main Attractions to Each Centre

Shopper's Survey Conclusion

4.4.17 The shopper's survey revealed that the majority of people shopping within the County were from County Meath (96.2%). Only 3.8% of respondents were from outside of County Meath. Grocery shopping acts as a major draw to each of the centres.

4.4.18 Only 3.6% of respondents were in the various centres for clothes and footwear shopping. This trend generally reflects the high level of comparison leakage from the Ccounty. The key attractions to the centres within the County were identified as "close to home", "parking free" and easy to get there by car". The need for "more shops/shopping centres" ranked highly in the suggested improvements to each of the centres.

4.5 Additional Consultation

4.5.1 In addition to carrying out the household and shopper surveys, an integral part of the study was to undergo consultation with key stakeholders. It was also considered important to obtain views from the Chamber of Commerce and main business groups within the County as well as representative from adjoining local authorities.

Key Stakeholders

4.5.2 Representatives from each Chamber of Commerce in the County were contacted in order to obtain their views on suggested improvements to each of these centres.

4.5.3 Submissions were received from the following groups:

- Kells Chamber of Commerce
- Navan Chamber of Commerce

4.5.4 A full copy of these submissions are attached as Appendix 1 of the Retail Strategy.

Kells Chamber of Commerce

4.5.5 The submission by Kells Chamber of Commerce sets out the following recommendations for consideration within the Retail Strategy:

- There exists in Kells an opportunity to develop a model of convenience outlet which would be sympathetic to the town of Kells. A market town environment can take advantage of proximity to larger population centres to increase footfall in a different retail environment.

- The type, level and nature of existing retail offer in Kells must be critically and objectively examined to ensure that any new retail development will work in tandem with existing premises to provide a vibrant and commercially successful retail offer to the people of Kells and its hinterland.

- A new Retail Evaluation Study should be conducted and that the undertaking of such a study be included as an objective in the new Development Plan and the Retail Strategy. The study would become the basis of an action plan to revitalise the retail sector.

- A demand for a more human shopping experience where individual shops are located in well co-ordinated clusters in settings of character.

- The Chamber suggests that disincentives to people shopping locally need to be addressed particularly where these issues are within the remit of the Meath local authorities. Paid parking is an issue that has been raised and often the issue is not the payment but what we would term the "fear factor".

- The revision of the County Retail Strategy provides an opportunity to adopt an innovative approach to the development of the retail sector in Kells. It is an opportunity to create a model that could be replicated in other level 3 centres in the Greater Dublin Area. Provision of suitable retail offer is a matter for retailers but must be supported by appropriate targeted policy measures in particular in relation to planning.

Navan Chamber of Commerce

4.5.6 The following points are addressed within the submission received from the Navan Chamber of Commerce:

- In accordance with the Planning and Development Act 2010, the Strategy should be consistent with the R~~r~~egional P~~p~~lanning G~~g~~uidelines hierarchy of development which designates Navan as the only major growth town in the County;
- To ensure that county Meath has an urban centre with sufficient critical mass and choice of retail offer to compete with similar size towns such as Blanchardstown;
- To avoid over-zoning in centres not designated for significant development;

- To ensure the vibrancy of established town centres;
- Improve the public realm of Navan to include green spaces and seating areas with an overall aim to enrich the experience of shopping in the county;
- To restrict out of town development to appropriate uses only;
- To encourage the provision of quality retail employment in proximity to residential accommodation, to facilitate a reduction in both travel trips and the dependency on private car transport as envisaged by the RPGs and NSS;
- To promote of relatively compact urban form, increasing the efficient use of land where appropriate, and to concentrate development into those centres that can be economically provided with high quality transport and other services and to promote high quality, sustainable integrated transport systems.

Consultation with Adjoining Local Authorities

4.5.7 A number of Local Authorities including Drogheda Town Council, Louth, Kildare, Fingal and South Dublin Councty Council and Dublin City Council were consulted at pre draft stage of the preparation of the retail strategy. No responses have been received to date.

CHAPTER 5 – HEALTH CHECK ASSESSMENT

5.1 Introduction

5.1.1 This section of the report provides an overview of the retail profile and health check assessment of the main urban centres in the County. In particular this section of the report assesses new major retail developments which have been permitted in each of the towns since the preparation of the previous strategy in 2003 and discusses the implications of this development for the future retail role and function of the towns. At the outset of the preparation of the Strategy, Meath County Council identified 8 key centres in the County where health checks should be undertaken. These include:

1. Navan
2. Kells
3. Trim
4. Enfield
5. ~~Laytown/~~Bettystown
6. Ashbourne
7. Dunshaughlin
8. Dunboyne

5.1.2 A brief survey of the principal smaller towns and villages in the County was also undertaken. Small towns/villages reviewed include:

1. Athboy
2. Ballivor
3. Clonee
4. Duleek
5. Kilmessan
6. Nobber
7. Oldcastle
8. Ratoath
9. Slane
10. Stamullen

5.1.3 Furthermore, a brief survey of that part of the environs of Drogheda located within the administrative area of Meath County Council was undertaken.

5.1.4 The retail offer in these smaller centres is often quite limited; however, local retailers in these small towns/villages play a vital role in maintaining the rural economy by providing a valued service to residents living within the rural hinterland.

5.1.5 Annex 2 of the Retail Planning Guidelines 2012 sets out the matters that should be taken into account when determining the vitality and viability of town centres. A health check assessment of the principal towns in County Meath is an integral part of the retail strategy. A health check assessment essentially analyses the strengths and weaknesses of town centres and is based on a qualitative analysis of factors such as the range and quality of activities in the centre, its mix of uses, its accessibility to people living in the area and its general amenity appearance and safety.

5.1.6 The Retail Planning Guidelines 2012 provide a comprehensive checklist of information to be included in a health check assessment. It is stated in the guidelines that a healthy town centre; which is vital and viable, balances a number of qualities including:

Attractions- These underpin a town and comprise the range and diversity of shopping and other activities which draw in customers and visitors.

Accessibility- Successful centres need to be both accessible to the surrounding catchment area via a good road network and public transport facilities, and to encompass good local linkages between car parks, public transport stops and the various attractions within the centre.

Amenity- A healthy town centre should be a pleasant place to be in. It should be attractive in terms of environmental quality and urban design, it should be safe and have a distinctive identity and image.

Action- To function effectively as a viable commercial centre, things need to happen. Development and improvement projects should be implemented efficiently; there should be regular and effective cleaning and maintenance and there should be co-ordinated town centre management initiatives to promote the continued improvement of the centre.

5.1.7 In addition to the above factors the Guidelines also recommend a number of other indicators that can be used to determine the vitality and viability of existing town centres. However, some of the information set out in the guidelines is not available for centres outside of the main metropolitan areas, for example- shopping rents~~;~~, pedestrian flows and pattern of movement in retail rents within primary shopping areas.

5.1.8 In order to determine the vitality and viability of existing town centres in County Meath the following indicators were utilised.

1. Attractions
2. Accessibility
3. Environmental Quality/Amenity
4. Diversity of Uses
5. Multiple Representation
6. Levels of Vacancy

5.1.9 Factors such as the extent of recent development, the suitability of existing floorspace and future development opportunities were also considered.

5.1.10 In addition the health check analysis also includes a SWOT Analysis and a clear definition of the core retail area.

5.1.11 Each health check assessment concludes by setting out key actions and recommendations for each centre and identifies potential retail opportunity sites. It should be noted that the opportunity sites identified in the health check assessment are potential retail development sites. The strategy is not intended to be prescriptive in this regard and other suitable sites for retail development may well come forward for development over the period of the Development Plan. Sites for retail development should be considered on their merits and in accordance with the principles of the sequential test. The merits of each opportunity site must be considered in the context of the proper planning and sustainable development of the area and due cognisance must be had to all relevant environmental factors including compliance with the Flood Risk Management Guidelines. Specific guidance regarding the assessment of a sites' suitability for retail development is detailed in Section 9 of this strategy.

5.1.12 Furthermore, it is acknowledged that some of the opportunity sites identified may not be suitable for certain forms of retailing. In this regard, edge of centre and out of centre sites may be appropriate where appropriately identified through the sequential test. This is acknowledged in the new ~~Draft~~ Retail Planning Guidelines. ~~which state:~~

~~*"Retailers also must look at issues such as scale and the possibility of changing core business models and adopting more flexible retail formats in order to blend in with local character". "Where an applicant can provide evidence that the requirement to set up in the sequentially preferable site is leading them altering their core business model and having a detrimental impact on the offering to the consumer, planning authorities may need to demonstrate flexibility in the assessment of the application. Where a case has been made for an out of centre site the applicant must show through use of the sequential approach that the most appropriate out of centre site has been chosen."*~~

5.1.13 The identification of a site as an opportunity site should not be taken as an assumption that the site is acceptable in principle for development.

5.2 Navan

Introduction

5.2.1 The M3 motorway connects Navan with Kells to the north-west (approximately 20 kilometres) and Dublin City to the south-east (approximately 50 kilometres). The M3 route travelling south-east also connects Navan with Dunshaughlin and Dunboyne.

5.2.2 Navan is also located on the N51 national road, connecting with Drogheda to the east (approximately 26 kilometres) and Mullingar to the west (approximately 52 kilometres).

5.2.3 Navan is the County Town of Meath and is identified as a primary development centre in the National Spatial Strategy. The population of Navan town was recorded as 3,710 in 2006. When combined with its hinterland area, the population of Navan in 2006 was recorded as 24,851. The 2011 Preliminary Census of Population indicates that the population of Navan has increased to 28,179 (including environs).

SWOT Analysis

<u>Strengths</u>

- Navan is easily accessible by private car, being located on the M3 and N51 national road networks.

- The town centre is generally attractive with a good level of footfall. The town centre is compact, allowing ease of movement and accessibility for pedestrians between the key retail streets and the Shopping Centre.

- Navan town centre has a number of attractive shopping streets, including Preston Place adjacent to Kennedy Road which is an attractive promenade of boutique shops and which offers a pedestrian connection between Trimgate Street and the Shopping Centre. Trimgate Street and Market Square, and to a lesser extent Watergate Street, also offer an attractive shopping experience. International multiples such as Marks and Spencers are a strength and attract retailers.

Photo 5.1: Preston Place connecting the town centre with Trimgate Street

Photo 5.2: Trimgate Street, Navan

- The retail offer of the town centre core is supported by services such as a number of public houses, restaurants and cafes to meet the demands of visitors. The Newgrange Hotel just off Market Square is a particular attraction in the town centre.

- Navan is well provided for in terms of bulky goods retailing due to the presence of the Blackwater Retail Park on Kells Road and Navan Retail Park on Athboy Road.

- Navan has a relatively strong comparison retail provision, with the shopping centre (known as Navan Town Centre) notable in this regard, which includes tenants such as Marks and Spencers and Dunnes Stores.

Weaknesses

- The main retailing areas are centred on Trimgate Street, Market Square and the Shopping Centre. Peripheral streets such as Canon Row, Railway Street and Brew’s Hill are generally less significant in terms of retailing, with a number of units being occupied by non retail uses.

- As a County town and the principal retail centre, a greater level of national and international multiples representation would be expected. Whilst there is a good range of both convenience and comparison retail offer, an increased level of multiple representation would enhance the attractiveness of Navan.

- Whilst the town centre is relatively compact, it suffers from traffic congestion which can at peak times make pedestrian movement through the town centre somewhat difficult. The town centre generally operates on a one-way traffic system due to its historic and narrow street layout and this contributes to traffic congestion in the town centre, and reduces accessibility.

Photo 5.3: Brew’s Hill, Navan

Photo 5.4: Railway Street, Navan

- The use of some of the public spaces surrounding the Shopping Centre is weak, including the surface car parking on the square opposite Kennedy Road, and the generally non-active facades of the south side of the Shopping Centre facing on to Kennedy Road. This leads to a poor retailing experience at this location and fails to take the opportunity to encourage linkages between the Shopping Centre and the traditional town centre towards Trimgate Street.

- Navan contains a number of pedestrian connections between the town centre area, centred around the Shopping Centre, and other town centre core areas, such as Trimgate Street and Market Place. Whilst Preston Place is one such laneway which is of a high standard and thus promotes connectivity, others such as Metges Lane are of poor quality and are not likely to attract pedestrians. The upgrade of these pedestrian routes have the potential to increase pedestrian permeability through the town centre and make the town centre experience more enjoyable for pedestrians. It is noted that Navan Town Council is currently in the process of carrying out a Renovation Scheme of Metges Lane, which is welcomed.

Photo 5.6: Entrance to Metges Lane from Trimgate Street

Photo 5.7 Entrance to Metges Lane from Kennedy Road

- Existing vacancy at Navan Retail Park suggests that there is a poor demand for retail warehousing uses in Navan.

Opportunities

- Navan has a large catchment area, aided by its accessibility by way of the national road network. There is an opportunity to expand the range of retail provision in Navan, particularly the provision of national and international multiples, to increase the attractiveness of Navan to visitors and ensure that it continues to operate in accordance with its role as a County town.

- There is also an opportunity to expand supporting services, such as cafes, restaurants, etc. Notwithstanding the presence of 2 no. three star hotels in Navan, an expansion of tourist accommodation facilities may assist with attracting visitors to the town.

- There are a number of town centre and edge of centre opportunity sites which could potentially accommodate additional retail development.

- There may be an opportunity for promoting a greater concentration of active retail uses to the southern façade of the Shopping Centre, addressing Kennedy Road, and for public uses of the square opposite the Shopping Centre, which is currently dominated by surface car parking. This would assist with encouraging linkages between the traditional town centre and the Shopping Centre area.

<u>Threats</u>

- Navan needs to increase its offer of national and international outlets in order to ensure the town can compete with adjacent centres such as Drogheda.

- The continuing traffic congestion in the core town centre area does not contribute to the character and appearance of the town or to its attraction as a shopping destination.

Definition of Core Retail Area

5.2.4 Navan has a relatively compact town centre with the main shopping areas within and around Kennedy Road, Ludlow Street, Market Square, the Navan Shopping Centre, Railway Street, Trimgate Street and Watergate Street.

5.2.5 Retailing also extends out to peripheral streets such as Railway Street and Brew's Hill, which provide a good range of independent retail units, such as butchers and musical instruments shops, mixed with residential at ground floor level and offices / commercial units above. Aldi is also present on Brew's Hill.

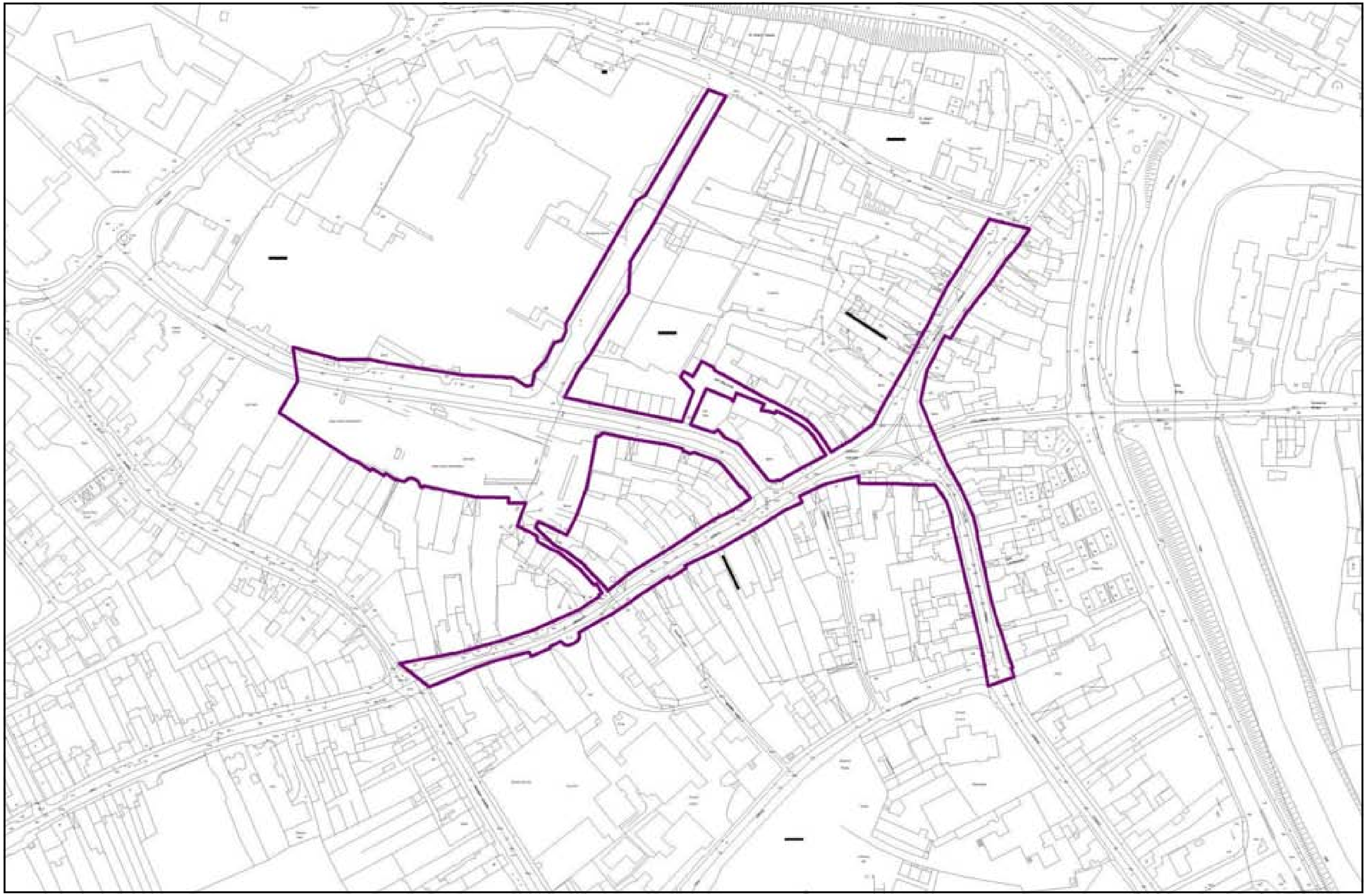


Figure 5.1: Navan Town Core Retail Frontage

Attractions

5.2.6 Navan has a number of attractions. Due to its position on the retail hierarchy, Navan is a key retail centre in the County and attracts both convenience and comparison customers. The type and range of comparison retail provision in the town is ~~unparelled~~ unparalleled in other towns in Meath.

5.2.7 The retail sector is supported by a good range of restaurants and cafes which assist with the retention and attraction of visitors.

Photo 5.8: Shopping Centre Extension, Navan Town Centre

5.2.8 The main retail attraction to Navan is the Navan Shopping Centre located on Abbey Road. Opened in 1981, the centre includes a range and diversity of shopping including the anchor stores of Dunnes Stores, Tesco and Penneys. National and international multiples such as Marks and Spencers, River Island, jack and Jones, are a key attraction in Navan. There are also a number of smaller units within the centre catering for convenience, comparison and service retailing.

5.2.9 The two hotels, the Newgrange Hotel located in the town centre, and the Ardboyne Hotel are further attractions.

5.2.10 There are also a number of leisure attractions in Navan, including the Diamond Cinema located in the town centre, the Boyne Ramparts Heritage Walk, Navan Golf Club at Proudstown, and Navan Racecourse.

5.2.11 Other attractions includes a library and the Solstice Arts Centre on Railway Street, which offers a diverse range of entertainment including drama, music, comedy, arts and theatre.

Accessibility

5.2.12 Navan is easily accessible by the national road network, being located on the M3 motorway. Travel time from Dublin City is less than one hour. The N51 national primary route connects Navan to Mullingar.

5.2.13 Navan is also accessible by bus, with Bus Eireann operating a number of services through Navan, most notably the service between Dublin and Cavan, with services operating every 15 minutes at peak a.m. and p.m. with half hour service thereafter. This service also serves Kells and Dunshaughlin. Other services connect Navan with Drogheda, Slane and Trim.

5.2.14 Within Navan, the town generally suffers from traffic congestion. This may be attributable to its historic street layout which is not conducive to large volumes of traffic. It is also noted that there are significant quantums of town centre parking, with both surface and multi-storey car parking at the Shopping Centre, in addition to surface car parks on Brew's Hill, Fair Green, Kennedy Road and at the junction of the N3 and the Inner Relief Road.

5.2.15 The volumes of traffic detracts from the attractiveness and permeability through the town and makes pedestrian permeability difficult. Pedestrian crossing facilities are generally provided at key crossing points.

5.2.16 Pedestrian movement through the traditional town centre area is generally a pleasant experience, assisted by the traditional visual appearance, the generally well maintained shopfronts and the high-quality paving, street furniture and landscaping. Movement between the traditional town centre and the Shopping Centre is assisted by a number of laneways connecting Trimgate Street with the Shopping Centre area.

5.2.17 There is generally a good provision of car parking in the town. Navan Shopping Centre provides a significant quantum of car parking in a multi-storey format.

Environmental Quality / Amenity

5.2.18 Notwithstanding the levels of traffic in the town, the town centre is generally well presented. Street paving and street furniture is generally well maintained. Litter bins are provided throughout the town and would appear to be sufficient.

5.2.19 Street landscaping is particularly strong on Market Square and Watergate Street, both of which contain attractive hard and soft landscaping.

Photo 5.9: Attractive Street Furniture and Paving on Market Square, Navan

Photo 5.10: High Quality Paving, Lighting and Soft Landscaping at Navan Town Centre

5.2.20 There are a number of attractive civic and religious buildings in the town centre, such as the Town Hall on Watergate Street.

5.2.21 The principal shopping streets are characterised by narrow plots, with building height ranging from three to four storeys generally. Shopfronts are typically traditional in character.

5.2.22 There are a number of heritage walks serving the town, most notably the Boyne Ramparts Heritage Walk, which offers a level of amenity to the town.

Diversity of Uses

5.2.23 The town centre provides a wide variety of higher/middle comparison and convenience goods in a range of retail outlet sizes. As befits a county town, there is a good range and diversity of other town centre functions and activities.

5.2.24 It is a busy and vibrant centre, and notwithstanding that the range of comparison retail provision is the most notable in the County, there is scope for improvement in terms of the range, quality and quantum of retail floorspace and other town centre activities plus the general environment of the centre. This is particularly true if the town is to significantly grow its offer, importance and attraction.

5.2.25 The town offers two retail parks, namely Navan Retail Park at Athboy Road and Blackwater Retail Park on Kells Road. Both Blackwater Retail Park, supporting the likes of Woodies, PC World, Harry Corry's, and Right Price Tiles, and Navan Retail Park contain vacant units. Navan Retail Park includes the likes of Petmania, Halford's, DID Electrical, Homebase, Cost Plus Sofas and Smyths Toys.

Multiple Representation

5.2.26 Whilst Navan has a relatively good range of brand name national and international comparison multiples, this is the market that Navan should seek to expand if it is to stem the flow of this expenditure from the town and County to other centres.

5.2.27 In terms of convenience provision, Tesco, Dunne's Stores and Marks and Spencer's and two large Supervalu's all operate out of Navan. The comparison market includes outlets such as Penney's, Heaton's, New Look, Pamela Scott, Marks and Spencers and River Island.

Rates of Vacancy

5.2.28 The vacancy rate in Navan is estimated at 10.5%[1]. The Shopping Centre in Navan town centre does not record any vacancies. Whilst vacancies are scattered throughout the town centre, the largest concentration of vacancies is towards the eastern end of Trimgate Street, and at Market Square and Watergate Street.

5.2.29 Figure 5.2 overleaf shows the rates of vacancy in Navan:

[1] Ground floor units within defined town centre core area only

Figure 5.2: Location of Vacant Units in Navan

Significant Changes to the retail Environment Since 2003

5.2.30 The following notable retail developments have taken place in Navan since 2003:

- Aldi discount foodstore on Brew's Hill of approximately 1,500 sq. m. gross floorspace;
- Lidl discount foodstore on the Trim Road of approximately 1,600 sq. m. gross floorspace;
- Navan Retail Park to the north west of the town at Athboy Road and Knockumber Road has also been completed, comprising 9 no. retail warehouse units with a total of approximately 12,000 sq. m. retail warehouse floorspace. Tenants include Homebase, DID Electrical, Cost Plus Sofas and Smyths Toys.
- Blackwater Retail Park on Kells Road containing approximately 13,000 sq. m. bulky goods retailing, with occupiers such as Woodies, Right Price Tiles, PC World, Byrne's Bookstores and Harry Corry.
- Marks and Spencers introduced to Navan Shopping Centre.

5.2.31 The Retail Planning Strategy for the Greater Dublin Area (2008) indicates that there is 11,325 sq. m. of net convenience floorspace and 21,087 sq. m. of net comparison floorspace in Navan. There is also 13,257 sq. m. of net retail warehousing floorspace. These figures do not account for the Aldi, Lidl and Navan Retail Park developments outlined above.

5.2.32 There are also a number of permitted developments, where construction has not yet commenced, which are of relevance. Most notable amongst these is a permission (Reg. Ref: NT900002) granted in November 2009 for a 10 year period to include the construction of Phase 1 of the designated town centre expansion comprising of a retail development providing 4,427 sq.m. gross convenience floorspace and 12,811 sq.m. gross comparison floorspace.

Retail Opportunity Sites

5.2.33 As can be seen from the vacancy survey outlined above, there are a number of opportunities for retailers to locate in Navan. This includes opportunities at town centre locations, such as Trimgate Street. In particular, vacant units adjacent to the cinema, located just off Kennedy Road form part of a laneway (Metges Lane) connecting Kennedy Road with Market Square. Navan Town Council is currently in the process of carrying out a renovation scheme of Metges Lane.

5.2.34 Notwithstanding the existence of a number of vacant units in the town centre, there are a number of key town centre opportunity sites which could be investigated for the provision of new retail development. The location of these sites is outlined on the map overleaf and they are described overleaf.~~:~~

5.2.35 It is also notable that the existing Navan Development Plan 2009 – 2015 identifies a town centre expansion site to the south of the existing town centre. As indicated above at paragraph 5.2.31, there is a current extant permission for Phase 1 of the development of this town centre expansion area. The town centre expansion area also represents an opportunity site.

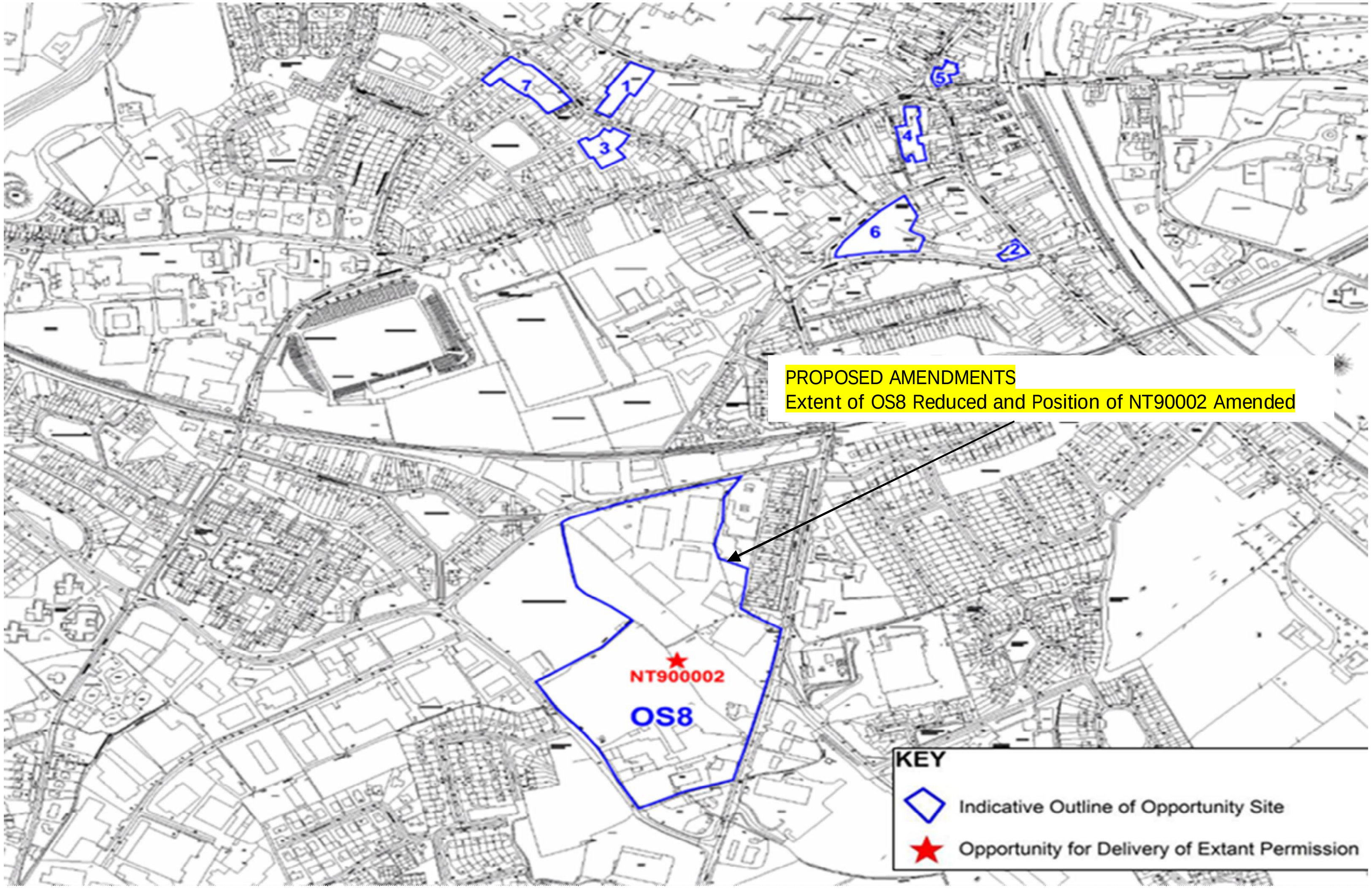


Figure 5.3: Opportunity Sites in Navan

OS1: Site adjacent to the Credit Union on Kennedy Road. This site, measuring approximately 0.3 hectares, is currently in use as surface car parking, and has frontage to both Kennedy Road and Canon Row. The site has the potential for~~to~~ retail development with opportunities for pedestrian connections between Canon Row and Kennedy Road. Such a development would be likely to have positive impacts on footfall both in the traditional town centre and the Shopping Centre, as well as introducing footfall to Canon Row, which despite its central location, currently lacks any notable retail activity.

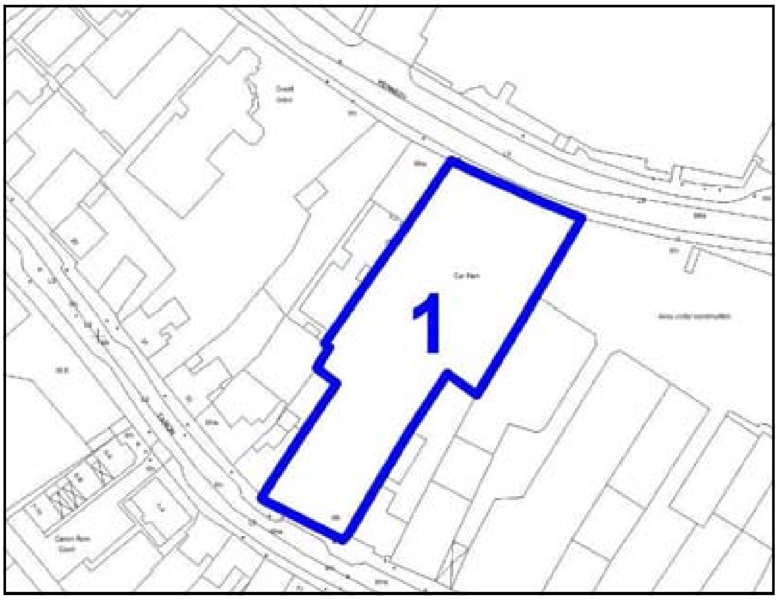


Figure 5.4 OS1 Navan

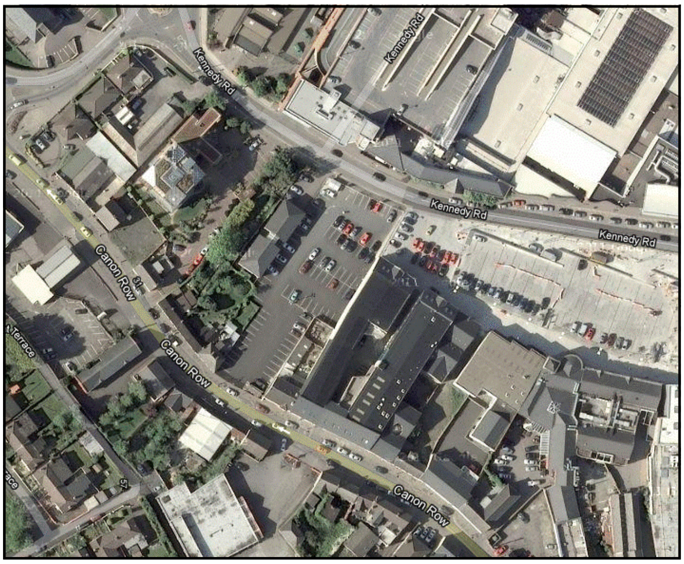


Photo 5.11: Aerial Photo of car park between Kennedy Road and Canon Row (*Source: Google Maps*)

Photo 5.12: Car Park between Kennedy Road and Canon Row (seen from Kennedy Road)

OS2: Site at Circular Road / Bridge Street: This site is located on the busy junction between Bridge Street and the Circular Road. It is currently used as a surface car park. Its redevelopment for retail use would assist with defining the edge of the retail core and would assist with footfall on Bridge Street, with possible linkages with the Newgrange Hotel to the east on Bridge Street. Planning permission has been granted on this site and site opposite (Academy Street and Circular Road) for mixed use development comprising residential, office, bar / restaurant and retail / commercial use (approximately 1,480 sq.m retail floorspace). Planning permission was –granted under Reg. Ref. NT800052 in January 2009.

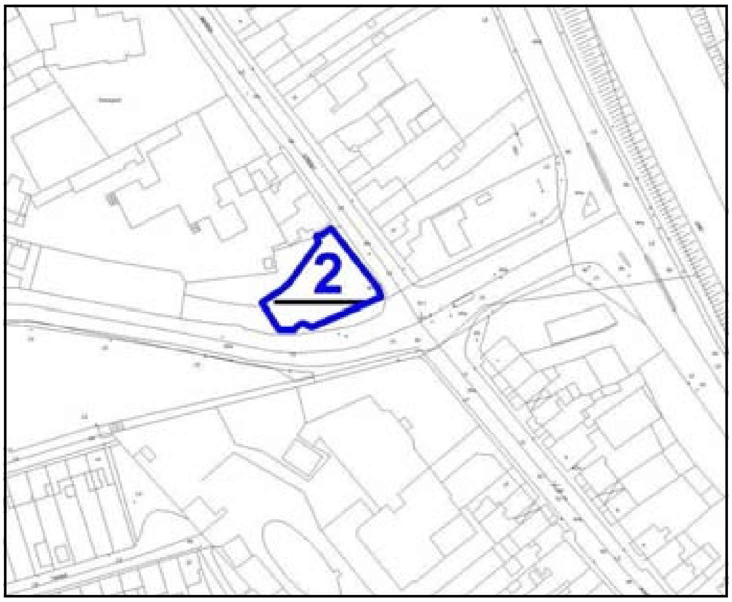


Figure 5.5:–OS2 Navan

Photo 5.13: Existing car park on the Bridge Street / C Road Junction

OS3: Site on Canon Row: This site, comprising approximately 0.26 hectares, is located on Canon Row within the core town centre area and is currently occupied by a single storey ethnic food shop and storage units, with surface parking to the front. The site is currently under-utilised and development for retail uses would bring footfall to Canon Row and encourage linkages through to the Shopping Centre.

Photo 5.14: Existing Car Park on the Bridge Street / Circular Road Junction

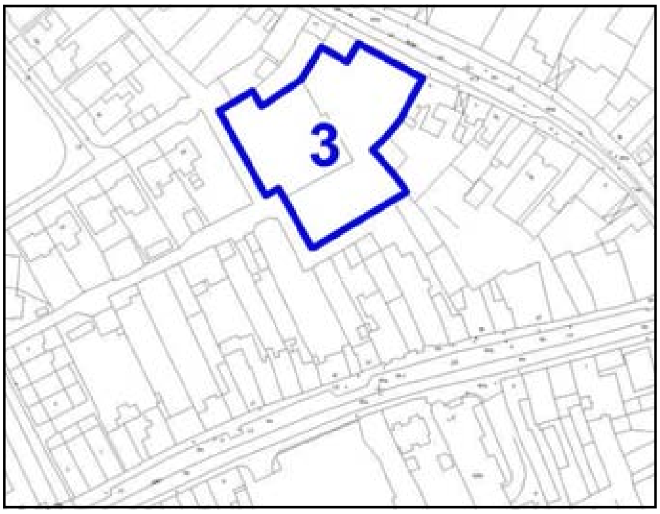


Figure 5.6 OS3 Navan

OS4: Old Cornmarket / Church Hill: Occupying a prominent position in the retail core of the town, this site of 0.18 hectares, including backlands, includes land with frontage to Market Square to the north and Church Hill to the south, and from the rear of buildings on Ludlow Street to the east and Old Cornmarket to the west. The site includes a protected building, the former St. Laurence Hotel fronting onto Market Square, and has the potential to accommodate retail uses. Planning permission was granted by An Bord Pleanala in 2006 (Ref: PL32. 214806 / NT40062) for a mixed use development with an overall floorspace of 7,409 sq. m., comprising a 72 no. bedroom hotel, office floorspace of 165 sq. m. retail units fronting Old Cornmarket and Church Hill and ancillary and associated uses. This permission was not implemented and the permission has now expired.

Photo 5.15: Former St. Laurence Hotel on Market Square

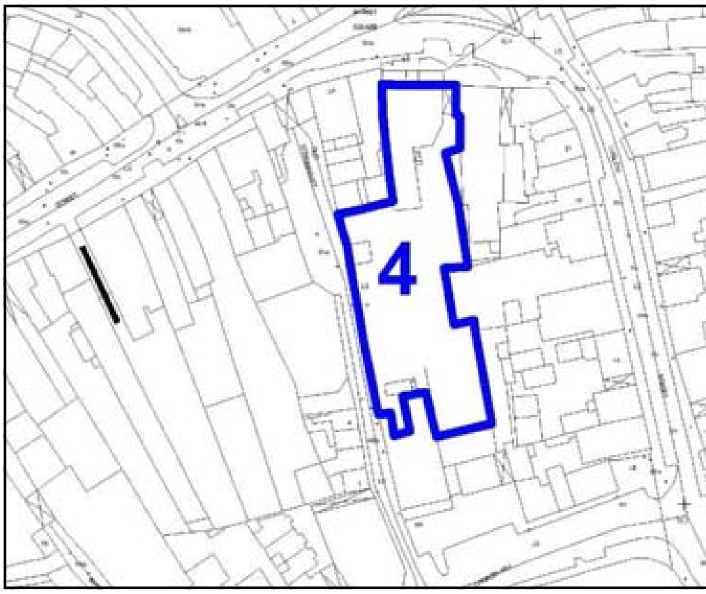


Figure 5.7 OS4 Navan

OS5: Existing Buildings on the corner of Market Square and Watergate Street: Two adjoining vacant properties on the corner of Market Square and Watergate Street offer a prominent location for retail development. The re-use of these buildings, potentially for a department store use or similar, would offer a significant attraction to this part of the town centre core area.

Photo 5.16: Two adjoining vacant buildings on the corner of Market Square and Watergate Street

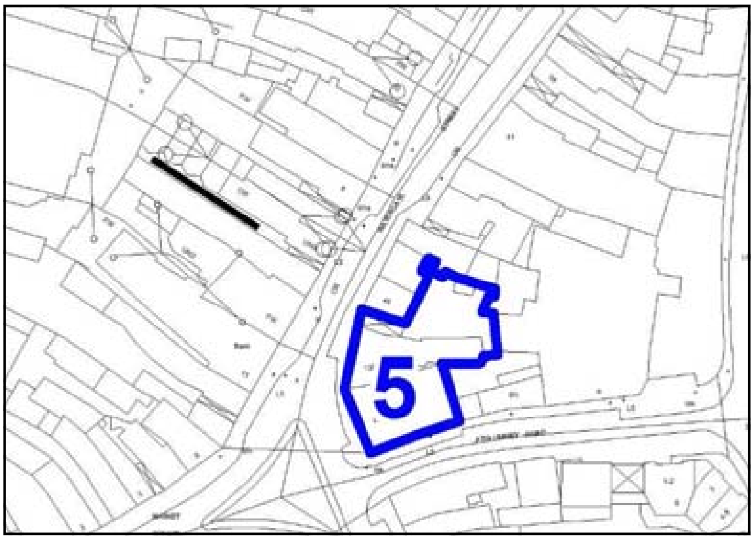


Figure 5.8 OS5 Navan

OS6: Church Hill / Fairgreen Car Park: This site is a significant surface car park located on Church Hill / Fairgreen. Located on the edge of the town centre core, it would represent a suitable location in principle for retail development.

Photo 5.17: Car Park on Church Hill / Fair Green

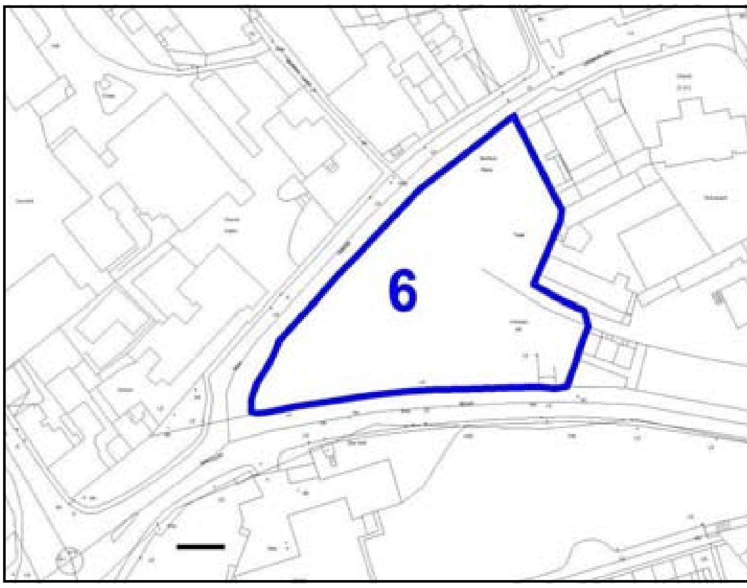


Figure 5.9 OS6 Navan

OS7: Corner of Canon Row / Emmet Terrace: This site contains the former Fruit Market building which is vacant and the adjoining former Joe Norris (Renault) car dealership which relocated to the Kentstown Road. The petrol filling station / shop (Top) occupy a portion of the site although the showroom building, workshop and extensive yard area are vacant / underutilised at present. The site has a good profile to both Emmet Terrace and Canon Row and has a prominent corner location.

Photo 5.18: OS7 Navan – Former Petrol Filling Station Site

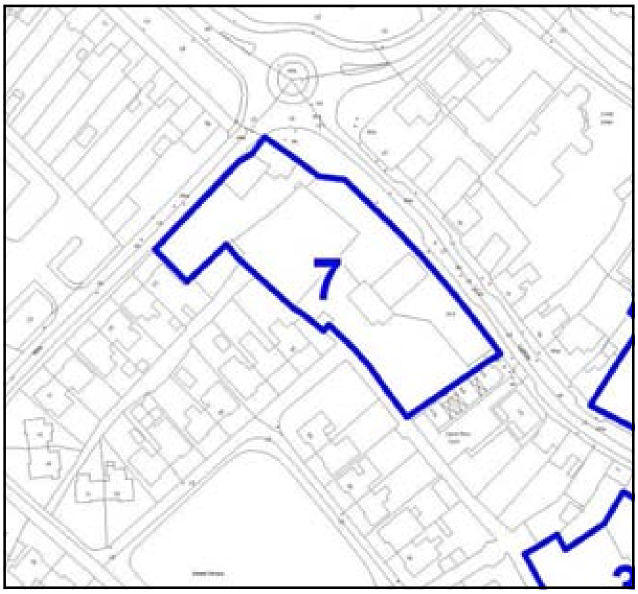


Figure 5.10: OS7 Navan

OS8 Designated Town Centre Expansion Area: This area, located in Abbeylands, has been designated as a town centre expansion area in the Navan Development Plan 2009 – 2015. There is an extant permission on the site under Reg. Ref: NT900002 for a 10 year permission to include 1) demolition of all existing structures on site none of which are residential 2) the construction of phase 1 of the designated town centre expansion comprising of-a retail development providing for 35,524m2 gross floor area(21,619m2 gross retail area).

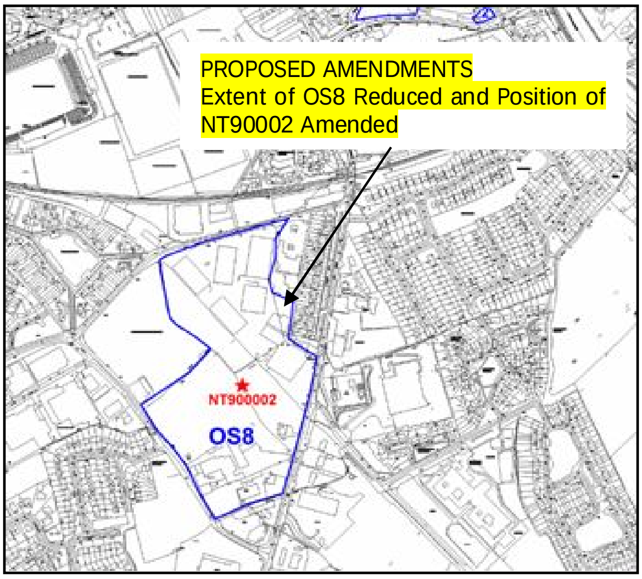


Figure 5.11: -OS8 Navan

Key Actions and Recommendations

~~5.2.35~~5.2.36 The key actions and recommendations arising from this health check are as follows:

(i) Identify measures to address traffic congestion in the town centre and improve pedestrian permeability, including measures to seek to remove significant amounts of through-traffic from the town centre, whilst ensuring that the town car remains accessible by car, and a car parking strategy;

(ii) Identify measures to attract national and international multiples to Navan in order to maintain and increase competitiveness. The utilisation of existing vacant premises in the town centre core area and opportunity sites in the town centre and edge of centre locations should be encouraged;

(iii) Generally encourage a greater range of comparison outlets in the core town centre area, including the utilisation of vacant units in the town centre, particularly on Trimgate Street;

(iv) Investigate measures for improving the retail offer and public realm of the area immediately to the south of the Shopping Centre, including encouraging high-end retailers to locate at this location, encouraging active uses and frontages to the Shopping Centre and investigating opportunities for public uses on the square opposite the Shopping Centre which is currently dominated by surface car parking;

(v) Identify appropriate town centre and edge of centre sites which can accommodate additional retail development, and particularly sites which have potential to attract national and international multiples.

(vi) Support development, particularly significant additional comparison retail development, in the town centre expansion area where it is demonstrated that there are no sequentially preferable sites.

Conclusions

~~5.2.36~~5.2.37 In accordance with its role as a County Town, Navan town centre is generally attractive with a good level of footfall. The town centre is compact, allowing ease of movement and accessibility for pedestrians between the key retail streets and the Shopping Centre. It has good accessibility by car and has a good provision of car parking in the town. Pedestrian permeability is generally good due to the compact form of the town centre.

~~5.2.37~~5.2.38 There is generally a good range of uses. However, further comparison uses, in particular from national and international multiples, would assist with retaining expenditure and increasing the attractiveness of the town as a retail destination.

~~5.2.38~~5.2.39 Despite its role as a County Town, there is a relatively high vacancy rate, with some prominent units in the town centre currently vacant. In addition, there are a number of town centre opportunity sites, the development of which for retail purposes should be encouraged.

5.3 Kells

Introduction

5.3.1 The town of Kells is a designated heritage town and is situated in the North West of County Meath at the junction of the M3 / N3 National Primary Route (Dublin-Cavan-Donegal) and the N52 National Secondary Route (Dundalk-Mullingar).

5.3.2 It is located 64 kilometres north west of Dublin, 15 kilometres north west of Navan and 50 kilometres south east of Cavan.

5.3.3 Kells is a picturesque town owing to its heritage, and assisted by the presence of the River Blackwater which flows around the town. Kells is also proposed as a UNESCO World Heritage Site and contains two designated architectural conservation areas (ACAs).

5.3.4 Kells, along with Ashbourne, Laytown/Bettystown and Trim are identified as Level 3 Sub-County Town Centres in the Retail Strategy for the Greater Dublin Area. Kells is identified as a secondary economic growth town in the Regional Planning Guidelines for the Greater Dublin Area 2010 – 2022 and its strong links with Navan are noted.

5.3.5 The population of Kells in 2006 was 5,916 persons. The most recent census information from Census 2011 indicates that the current population of the town and environs is 5,888 persons. The environs of the town has experienced significant population increase with an actual decrease in the population in the Kells Urban area as noted in the Core Strategy section of the Draft Kells Development Plan 2013-2019.

SWOT Analysis

Strengths

- Kells is an attractive historic and heritage town enriched by buildings and structures from the Monastic, Anglo-Norman and Georgian periods. The town has significant potential as a tourist destination.

- Heritage is a significant attraction in Kells, which is proposed as a UNESCO World Heritage Site and which includes a number of notable heritage features and attractions such as the monastic layout of the town, the Monastic enclosure with the High Crosses, Round Tower, St. Colmcilles House and the Scriptural Market Cross at the entrance to the Heritage Centre.

- Previous traffic management issues which saw Kells used as a through-route to reach surrounding settlements such as Oldcastle, Athboy, Slane and Mullingar have been largely alleviated by the N3 bypass and the completion of the M3 motorway.

- Car parking provision in the town generally appears to be sufficient to meet demand. Pay and display car parking is in operation in the town centre, with a maximum stay of two hours.

- Kells has a number of listed buildings and archaeological sites which together will constrain the potential for development of particular areas close to the town centre. There are two Architectural Conservation Areas (ACA) designated in the town.

- Parts of the town, and particularly Headfort Place, are notable for urban enhancement works which increase the attractiveness of the town.

- The town centre generally lacks vibrancy and has a low footfall. As a Sub-County Town Centre, it should have a greater and better convenience offer. The only major convenience offer is Super Valu and Aldi, both located in an edge of centre location near the junction of the R147 and N52.

Photo 5.19: Farrell Street, Kells

Photo 5.20: John Street, Kells

Weaknesses

- The retail offer of the town centre is limited to a number of small independent traders with a limited range of convenience and comparison goods. Therefore, while the town centre has a number of historical attractions for visitors, as a retail destination its retail offer is weak.

- The main convenience retail provision, comprising of Supervalu and Aldi, is removed from the town centre.

- It is also apparent that the town lacks a full range of supporting facilities, such as cafes, restaurants and gift shops.

Opportunities

- Kells is designated as a Level 3 Sub County Town, and together with its tourism attraction, this represents an opportunity for Kells to grow in retail terms to meet its function.

- There are a number of vacant / derelict town centre properties which could be utilised for new retail development.

- Farrell Street has the potential to be a particularly attractive shopping street. The width of the street offers the potential for additional public spaces to be included. The street is currently utilised on both sides for on-street car parking. The removal of some of this parking, and the introduction of soft landscaping, high-quality street furniture, traffic calming measures and pedestrian crossing facilities would significantly improve the appearance of the street.

- The completion of the M3 has reduced the level of through traffic in the town, thus creating the potential for a higher quality retail location and pedestrian environment.

- There are two designated Architectural Conservation Areas in Kells (the historic Core ACA and the Headfort Place ACA). Consideration will be given to the introduction of a Special Planning Control Scheme on key streets which would provide greater control over signage and land uses. This could help enhance the retail experience within the town centre.

Photo 5.21: Vacant Properties on Castle Street, Kells

Photo 5.22: Vacant Properties on Market Street, Kells

Threats

- Due to its absence of an appropriate range and level of retail offer, Kells fails to retain expenditure and leakage to competing centres such as Navan, Oldcastle, Ardee, and Blanchardstown is a threat to the retailing sector in Kells.

- The historic nature of the town centre means that it is difficult to accommodate large floorplates, which may be a deterrent to large convenience and comparison retailers locating in the town centre.

- The completion of the M3, improves accessibility to the town by also allows residents of the Kells to travel to competing centres such as Blanchardstown in less time.

Definition of Core Retail Area

5.3.6 Kells has a historical background and its street pattern and layout is determined by an old monastic enclosure.

~~5.3.6~~5.3.7

~~5.3.7~~5.3.8 The main commercial streets include Castle Street, Market Street, John Street, Cross Street, New Market Street, Suffolk Street and Farrell Street. The majority of the buildings in the town centre are traditional 2 storey townhouses, with commercial users at ground floor level.

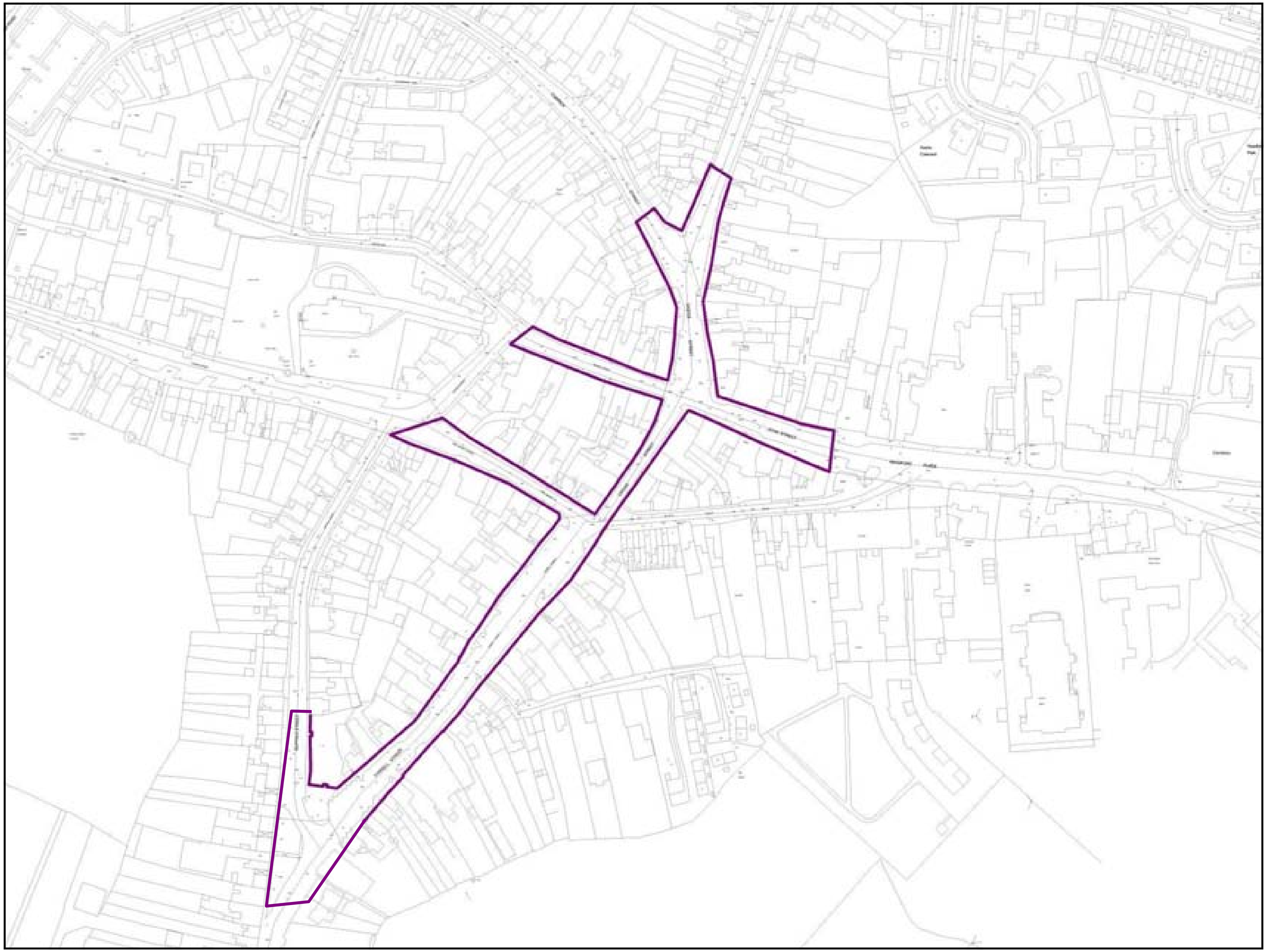


Figure 5.11: Kells Town Core Retail Frontage

Attractions

~~5.3.8~~5.3.9 Kells is a significant tourist attraction owing ~~primarly~~ primarily to its heritage status. There are a number of heritage attractions in the town centre and on the outskirts of the town which makes Kells a destination in itself. Such attractions in the town centre include St. Columba's Church and grounds, including the Round Tower and High Crosses, the 10th century St. Columcille's House, and the 18th century Spire of Lloyd.

~~5.3.9~~5.3.10 A 'Kells Historic Trail' was established in 2010 and the trail features panels and plaques at 14 historic points around the town. The trail commences outside the Kells Civic Offices where~~by~~ you can pick up a map and follow the walking trail through the town.

~~5.3.10~~5.3.11 Kells is not recognised as a shopping destination and will not attract visitors from outside its immediate catchment area for this purpose.

Photo 5.23: Tourist Information Board at St. Columba's Church

Photo 5.24: Round Tower and Cannon Street, Kells

Accessibility

~~5.3.11~~5.3.12 Kells has excellent accessibility by private car, being served by the N3 / M3 network, which connects with Dublin to the south-east and Cavan to the north. This national road network also serves the towns of Navan, Dunshaughlin, Virginia and Cavan.

~~5.3.12~~5.3.13 Kells is also accessible by bus, with Bus Eireann operating a number of services through Kells, most notably the service between Dublin and Cavan, with services operating every half hour, with a travel time to Dublin of approximately one hour twenty minutes. This service also serves Navan and Dunshaughlin.

~~5.3.13~~5.3.14 Kells has a relatively good pedestrian network in the town centre, assisted by the attractive historical layout. Footpaths are of a relatively good standard. However, there is generally a lack of pedestrian crossing facilities throughout the town centre.

Environmental Quality / Amenity

~~5.3.14~~5.3.15 The town centre generally has a traditional appearance. Whilst the appearance of the town centre is assisted by a number of historic buildings, such as St. Columba's Church and grounds, including the Round Tower, the appearance of the town is not helped by a number of vacant and derelict properties scattered throughout the town centre.

~~5.3.15~~5.3.16 In terms of its heritage function, the town is well provided for in terms of directional sign-posting, tourist information boards and the Kells Heritage Trail plaques.

Photo 5.25: Attractive Street Furniture and Landscaping, Headfort Place, Kells

Photo 5.26: John Street, Kells

Diversity of Uses

~~5.3.16~~5.3.17 Retail provision in the town centre is dominated by independent retailers. There is generally a good range of independent retailers, offering a full range of services. The main centre of activity is Farrell Street which displays a mix of uses including ladies and men's fashion boutiques, children's fashion boutiques, a grocery store, a butcher, a florist, a pharmacy, a number of newsagents, a barbers, a health and beauty outlet, and a number of public houses, restaurants and take-aways.

~~5.3.17~~5.3.18 New Market Street, connecting with Farrell Street at its southern end, is also an attractive town centre street providing a number of services such as a charity shop, an international convenience food outlet, a health and beauty store, a handmade soap shop, a gift shop, a footwear shop, a dry cleaners and a coffee shop. Other town centre core streets include Market Street, Cross Street, John Street and Castle Street and these provide additional retail and retail service outlets such as an art studio, a ladies fashion boutique, opticians, bookmakers (all on John Street), gift shop, motor factors (Castle Street), butchers, electrical appliances outlet, estate agent (Market Street), a drapery shop and a pharmacy (Cross Street). The town centre also contains a number of financial institutions, a library and a Credit Union, as well as a number of restaurants.

~~5.3.18~~5.3.19 The town centre has a very limited range of convenience shopping facilities. There are a number of newsagents, butchers and grocers in the town centre, together with a number of small convenience stores, for example an independent convenience store on Headfort Place, a Centra to the west end of Farrell Street, and an independent convenience store on the corner of Cross Street and New Market Square. With the exception of Super Valu and Aldi located in an edge of town location at the junction of the N3 and N52, there is poor provision of convenience shopping facilities in the town. The Supervalu store is circa. 1,400 sq. m. net floorspace and anchors a small Shopping Centre which also includes 4 no. additional retail units, including a pharmacy, a hair studio, and a butchers shop.

~~5.3.19~~5.3.20 Furthermore, whilst there are a number of independent comparison outlets, the town generally lacks an appropriate range of such facilities which would increase the attractiveness of the town and reduce leakage to surrounding centres. The presence of the Headfort Arms Hotel on Headfort Place is also an important attraction for the town.

Photo 5.27: New Market Street, Kells


Photo 5.28: Farrell Street, Kells

~~5.3.20~~5.3.21 It is also notable that there remain a number of residential properties, in many instances occupying ground floor units, in the town core and on the periphery of the town core.

~~5.3.21~~5.3.22 The main area of commercial / industrial activity is centred on Kells Business Park, located approximately 1 kilometre from the town centre. The business park accommodates a range of business / commercial / industrial premises.

Multiple Representation

~~5.3.22~~5.3.23 The town generally lacks multiple representation. In terms of convenience provision, both Super Valu and Aldi are present to the north of the town. There are no comparison multiples present in the town.

5.23 Rates of Vacancy

~~5.3.23~~5.3.24 The vacancy rate in Kells is estimated at 11.5%[2]. Vacancy is generally concentrated around the western end of Farrell Street and also on Castle Street and Market Street in particular.

~~5.3.24~~5.3.25 Figure 5.12 overleaf shows the locations of vacancy in Kells.

[2] Ground floor units within defined town centre core area only

Figure 5.12: Location of Vacant Units in Kells

Significant Changes to the Retail Environment Since 2003

~~5.3.25~~5.3.26 The only significant changes identified in the retail environment in Kells since 2003 has been the redevelopment of Kells Shopping Centre, anchored by Supervalu, and the Aldi development also on the Cavan Road. The Aldi store has a gross floor area in the region of 1,125 sq. m. net floorspace.

~~5.3.26~~5.3.27 Development in the town centre has generally remained stagnant. The only notable development in or close to the town centre since 2003 has been development on Suffolk Street (Kells Town Reg. Ref: KT/30022) comprising the construction of a three storey building to include 2 no. ground floor retail units with residential above. The ground floor units are now occupied by Centra and a carpet outlet. These provide for circa. 200 sq. m. of retail floorspace each.

~~5.3.27~~5.3.28 The health check has not identified any other significant developments in the retail environment in Kells since 2003.

~~5.3.28~~5.3.29 The Retail Planning Strategy for the Greater Dublin Area (2008) indicates that 1,811 sq. m. of net convenience floorspace and 3,450 sq. m. of net comparison floorspace was present in Kells. These figures do not account for the recent Aldi and Bective Square developments.

~~5.3.29~~5.3.30 They only notable significant pipeline development relates to development granted permission by An Bord Pleanala under reference PL49.234285 in March 2010 (KT/800014) for development of a backland area bounded to the north by established development fronting to Kenlis Place and Headfort Place, to the west by established development fronting to Bective Street and Farrell Street, to the east by playing fields associated with the Secondary School, and to the south by undeveloped zoned lands. The approved development comprises of 199 no. residential units, ~~3,100~~4,402 sq. m. gross convenience and 5,658 ~~8,853~~ sq. m. of comparison floorspace, commercial uses, a civic square of 4,100 sq. m. and a total of 951 no. car parking spaces. The permission has a life of ten years and construction has not commenced.

Retail Opportunity Sites

~~5.3.30~~5.3.31 As can be seen from the vacancy survey outlined above, there are a number of opportunities for retailers to locate in Kells town centre.

~~5.3.31~~5.3.32 Furthermore, the implementation of the permission for the development of Kells backlands, to the rear of Bective Street / Farrell Street, would be a significant contribution to the retail sector in Kells. There is also a large backland area to the rear of Suffolk Street and Cannon Street which could be utilised for retail development. These areas were identified as potential expansion areas in the Kells Retail Evaluation Study 2006 that conformed to the Sequential Approach. The development of one or both of these areas would provide the much needed boost in both quantity and quality of floorspace to the town. The sites also provide the ability to integrate the new retail areas with the existing town through vehicle and pedestrian linkages. In this regard, they are key opportunity sites.

~~5.3.32~~5.3.33 Notwithstanding the existence of a number of vacant units in the town centre, there are a number of key town centre opportunity sites which could be investigated for the provision of new retail development. The location of these sites is outlined on the map overleaf and they are described below. Town centre opportunity sites are limited due to the historic nature and layout of the town. Therefore, opportunities to locate new retail development in existing vacant buildings in the town centre should be pursued.

OS1: Former 'Miller's' Building on Market Street: Located within the town centre core, this two storey building, which extends a significant distance to the rear, is in a prime location for either convenience or comparison retail development. It is understood that the building was last in use as a supermarket.

Photo 5.29: Opportunity Site 1 – Market Street

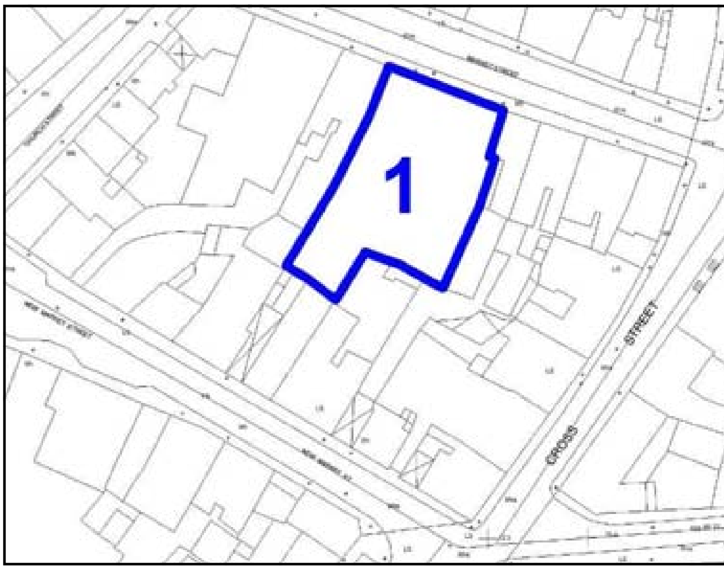


Figure 5.13: OS1 Kells

OS2: Located on the corner of John Street and Castle Street, these adjoining vacant properties offer an excellent opportunity for appropriate re-use for retail development. The town centre core location would be suitable for comparison retail use or a department store use. Other suitable uses would include a restaurant.

Photo 5.30: Opportunity Site 2 – Corner of John Street and Castle Street

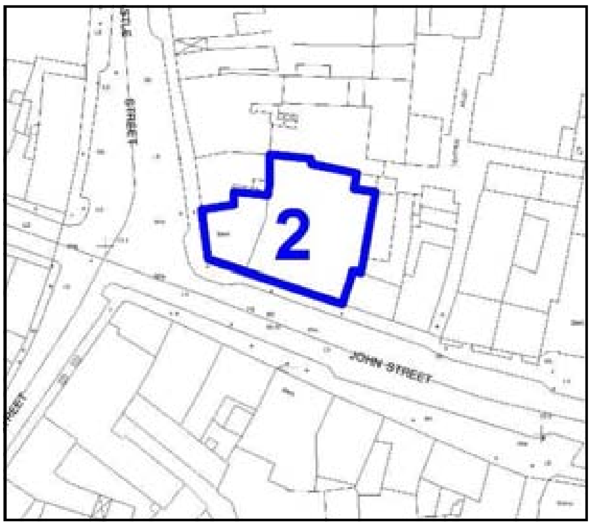


Figure 5.14: OS2 Kells

OS3: Located on Suffolk Street just outside the core retail area, this building was originally a cinema and most recently was in use as a carpet warehouse. The redevelopment of this site would increase the attractiveness of Suffolk Street, which currently lacks in vitality in retail terms.

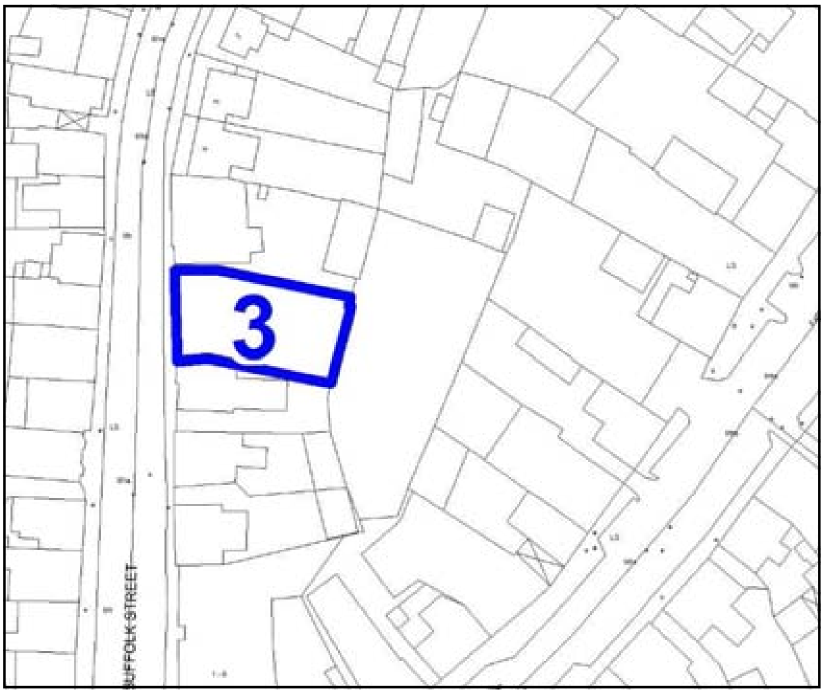


Figure 5.15: OS3 Kells

OS4: Backlands to the east of Suffolk Street. This site, zoned for new town centre activities in the Kells Development Plan 2007 - 2013 comprises the backlands to the east of Suffolk Street and the south of Cannon Street / Climber Hill. These extensive greenfield lands offer an opportunity for a substantial development.

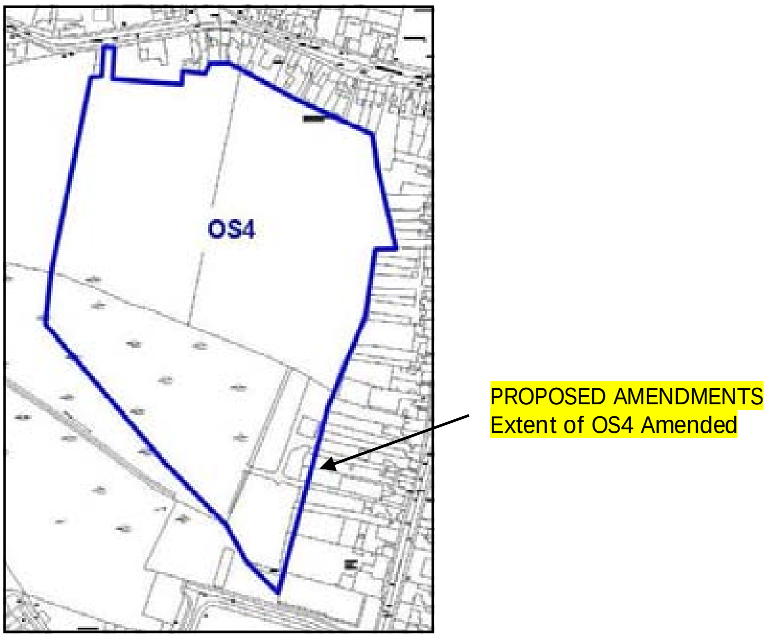


Figure 5.16: OS4 Kells

OS5: Backlands to the west of Farrell Street: This site, also zoned for new town centre activities in the Kells Development Plan 2007 – 2013, again represents a sizeable greenfield site to the rear of the town centre where an opportunity exists for retail or mixed use development. There is an extant permission on these lands under Reg. Ref: KT/80014 for a mixed use town centre development comprising of retail, residential, commercial, ~~creche~~crèche, civic space and ancillary and associated uses. Approximately 15,833 sq. m. of retail and commercial uses are included in the scheme.

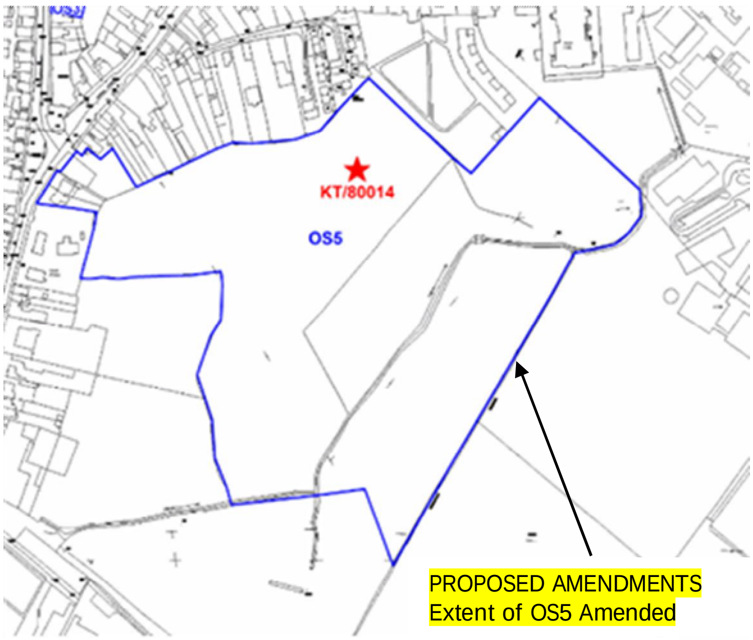


Figure 5.17: OS5 Kells

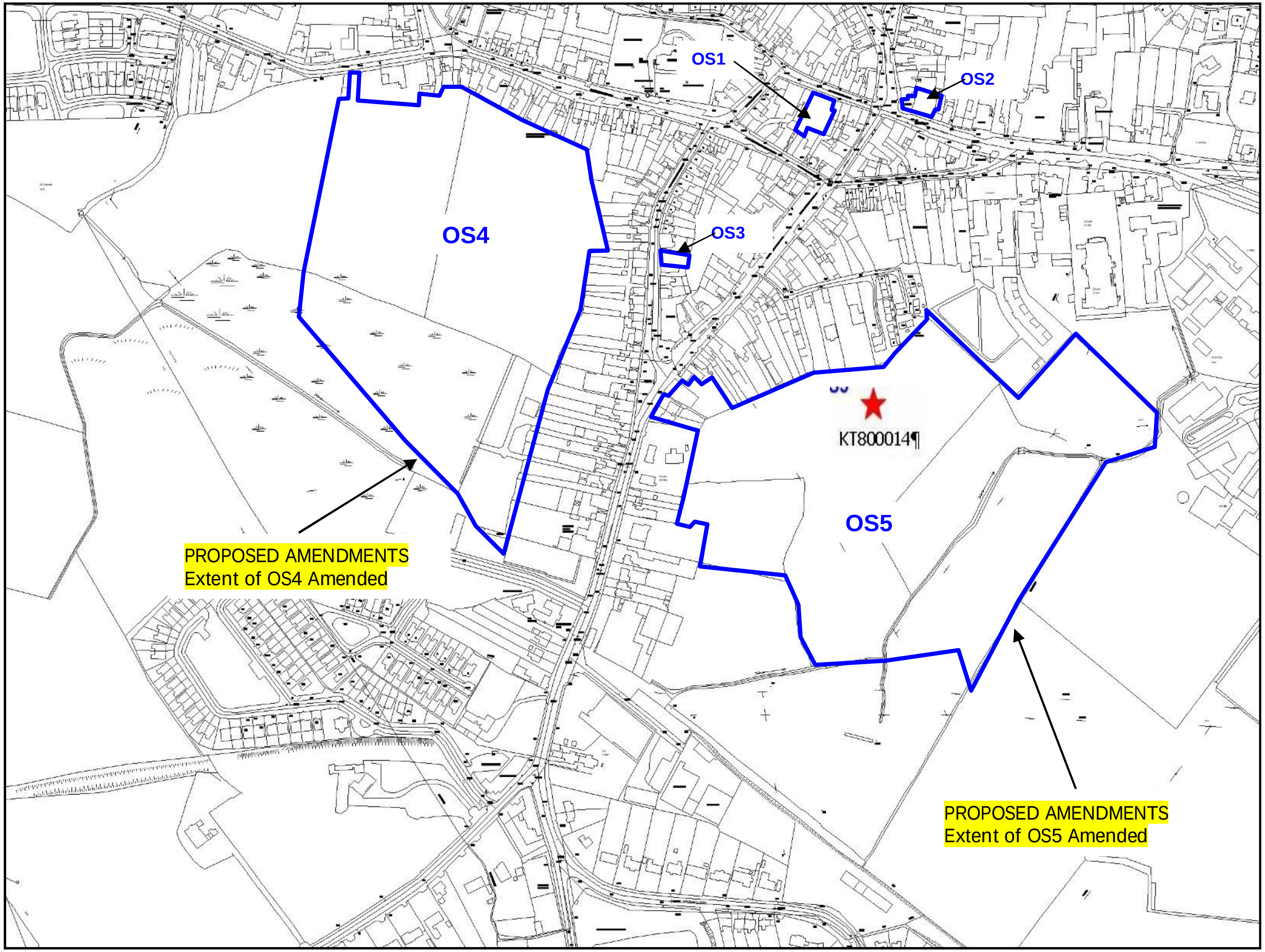


Figure 5.18: Opportunity Sites in Kells

Key Actions and Recommendations

~~5.3.33~~5.3.34 The key actions and recommendations arising from this health check are as follows:

(i) Promote the development of further convenience development in the town;

(ii) The potential for~~of~~ a comprehensive upgrade of Farrell Street should be investigated, to include the provision of public spaces, high quality landscaping and street furniture, and other measures which would attract visitors. Improvements to the public realm should assist where possible in the interpretation and promotion of Kells unique heritage and importance;

(iii) Identify measures to attract more retail to the town generally, in order to maintain and increase competitiveness;

(iv) The utilisation of existing vacant premises in the town centre core area and opportunity sites in the town centre and edge of centre locations should be encouraged. The development of key backland sites should also be promoted;

(v) New development should be integrated with the traditional retail areas of the town and should be sympathetic to the heritage and character of Kells. The key objective should be to create a vibrant and commercially successful retail sector to the town and its hinterland;

(vi) Investigate measures for improvement to the public realm in the town centre generally. Such improvements should respect the unique heritage of Kells and promote this where possible;

(vii) Promote additional café, restaurant and gift / tourist shops in the town centre in order to attract tourists to the town centre and provide a link with the retail provision in the town;

(viii) Promote linkages between the retail developments (Kells Shopping Centre, anchored by Supervalu, and Aldi) at an edge of centre location to the north of the town and the town centre.

Conclusions

~~5.3.34~~5.3.35 Kells is under-performing in terms of its role as a Level 3 Sub-County town. In order for~~to~~ Kells to function in accordance with its role, there will need to be a considerable strengthening of the town's retail offer, both in convenience and comparison terms.

~~5.3.35~~5.3.36 There are a number of opportunities in the town centre for retail development, particularly on sites which are currently vacant, which should be investigated as a priority. Due to the constraints associated with the historical layout of the town, opportunities for further retail development at edge of centre locations should be considered.

~~5.3.36~~5.3.37 There is a good opportunity to seek to attract tourist visitors to the town centre, and to retain these visitors in the town centre. In order for this to be successful, the retail offer of the town needs to be expanded and upgraded, and additional tourist related facilities such as restaurants, cafes, gift shops and potentially additional town centre accommodation, needs to be provided. Public realm upgrades should also be investigated, particularly on Farrell Street.

5.4 TRIM

Introduction

5.4.1 Trim is located in the south west of County Meath at the junction of a number of regional routes, and to ~~the~~ Summerhill and Kilcock / M4 in the opposite direction~~.~~. The R161 connects Trim to the County Town of Navan, which is located approximately 14.5 km to the north east. The R160 connects Trim to the M3 motorway junction at Dunshaughlin, which in turn provides access to Dublin City to the south east (approximately 46 kilometres). Trim is accessible from the M4 motorway via the R158 through Enfield.

5.4.2 Trim is the largest urban centre serving the south west of the county. Trim is designated as a Moderate Sustainable Growth Town in the Regional Planning Guidelines for the GDA 2010-2022 and is located within the Navan Core Economic Area along with Kells. Trim is designated as a Sub-County Town Centre in the GDA Retail Hierarchy. The population of Trim and immediate environs was recorded as 6,870 persons in 2006 and 8,268 in 2011 (preliminary Census 2011). The population of the legally defined town council area was recorded as 1,375 persons.

5.4.3 Trim is a designated Heritage Town and the vestiges of Trim's history are clearly evident on the landscape and in the built environment, which provide an important and attractive context for a modern expanding town. Another notable physical characteristic of the town i1s the presence of the River Boyne, which flows directly through the town.

SWOT Analysis

Strengths

- Trim is easily accessible by car from the surrounding hinterland as it is the focal point for a number of regional roads. The development of the M3 motorway has also resulted in Trim being more accessible from the wider GDA and has removed through-traffic from the town.

- Trim is a Heritage Town with a significant number of protected structures, archaeological sites, including Trim Castle, and a portion of the town centre is designated as an Architectural Conservation Area (ACA). The narrow winding streets, consistent with its medieval origins, contribute to the notable character of the town.

- The town centre is attractive with many 18^{th} and 19^{th} century buildings, mostly two to three stories in height with a Georgian style dominating. Trim has a relatively compact urban structure, allowing ease of movement and accessibility for pedestrians between the key retail streets.

- The core retail area is located south of the River Boyne and is focused on Market Street, Emmet Street and Castle Street and offers an attractive retail and pedestrian environment. There is a low level of vacancy in the town centre.

- In addition a number of comparison, convenience and service retailers have developed along New Haggard Street to the north of the River Boyne and this area acts as a secondary retail core for the northern part of Trim town centre.

Photo 5.31: Market Street

Photo 5.32: View of Castle Street from Market Street

- The retail offer of the town centre is supported by services including a number of public houses, restaurants and cafes to meet the demands of visitors. The Trim Castle Hotel, which includes a Kilkenny shop at ground floor level, is a significant addition to Trim since the last Retail Strategy was prepared in 2003.

- A number of recent developments in the town have resulted in positive modern architectural buildings which complement the existing character of Trim. The most notable structures include the new Courthouse building.

- Trim has also benefited from the Government's decentralisation programme with the new headquarter offices of the OPW developed to the west of Emmet Street on the lands designated for town centre expansion.

- Trim has a high quality public realm with good footpaths, street furniture and lighting which invokes a positive ambiance in the town.

- The absence of a national road passing through Trim results in the town not being affected by significant national through traffic. All through traffic is channelled to the Inner relief Road resulting in the town centre remaining relatively uncongested.

Weaknesses

- Trim is under provided for in terms of national and international convenience and comparison retailers. At present Lidl, Super Valu and Spar are the primary convenience retailers in the town. Kilkenny is the only national comparison retailer present in Trim town centre.

- As a Sub-County Town, a certain level of representation of national and international multiples would be expected.

- There is a lack of connectivity between the OPW offices and the adjoining town centre expansion lands, and the core retail area of Trim town centre.

- There has been no significant enhancement of Trim's retail offer since the preparation of the 2003 County Retail Strategy.

- The quality of the built environment, retail uses and public realm on Emmet Street is relatively poor and leads to a poor retailing experience in this location in the core retail area.

- Trim is poorly provided for in terms of bulky goods retailing with no purpose built retail warehouse park. A small scale retail park has been developed on the Navan Road, known as Trim Retail Park, however this has a limited retail warehouse offer as it was originally approved by the Planning Authority as Meath Motopark for uses related to the auto trade industry. However, in the interim period a furniture operator has located in this retail park.

- A Retail Warehouse Park was permitted on the Dublin Road at Iffernock, Trim under Reg. Ref.: TA70464 (ABP Ref.: PL 17.229337), however, this development has not proceeded to date.

Opportunities

- Trim is the most important retail centre in the south west of the County and therefore has a significant catchment population. In addition Trim is a nationally recognised centre of heritage importance and therefore an important tourist destination within the GDA. There is an opportunity to expand the range of retail provision in Trim, particularly the provision of national and international convenience and comparison multiples, to increase the attractiveness of Trim and to ensure that it continues to operate as a Sub-County Town Centre.

- A large area to the west of Emmet Street and Watergate Street has been identified as a suitable location to accommodate expansion of the town centre. The importance of creating strong linkages between the town centre expansion area, which includes the OPW offices, and the existing town centre is set out in the existing Trim Development Plan. There are a number of other edge of centre sites which could potentially accommodate additional retail development. Furthermore, the site of the permitted town centre development to (Reg. Ref: TT/60023 & PL82.224029), which includes a retail anchor convenience unit consisting of 2,400 sq. m., 21 no. retail units ranging in size from 87 sq m to 217 sq m consisting of convenience, comparison and non-retail services floorspace, could also accommodate additional retail development.

- The core retail area of Trim and the town centre in general is relatively compact with ease of movement between the shopping streets and surrounding attractions such as Trim Castle. There may be an opportunity for increased pedestrian friendly measures within the core retail area, particularly along Market Street, such as traffic calming and raised pedestrian areas, which would improve the attractiveness of the town centre as a retail destination.

- The Historic Core of Trim is designated as an Architectural Conservation Area. The Planning Authority should consider the introduction of a Special Planning Control Scheme on key streets which would provide greater control over signage and land uses. This could help enhance the retail experience within the town centre.

Threats

- Increased leakage of expenditure from Trim and its surrounding catchment area due to the under provision of national and international convenience and comparison. This could undermine the Sub-County role of Trim within the County and adversely affect the vitality and viability of the town centre.

- The town centre expansion lands were identified in the Trim Development Plan 2002. No development has commenced at~~in~~ this location to date for a number of reasons. In addition other sites should be identified to cater for expansion of the retailing functions of the town.

Definition of Core Retail Area

5.4.4 Trim has a relatively compact town centre with the main shopping area concentrated around Market Street, Emmet Street, Castle Street and Bridge Street. An opportunity exists for the expansion of the core retail area onto the designated town centre expansion lands to the west of Emmet Street and Watergate Street.

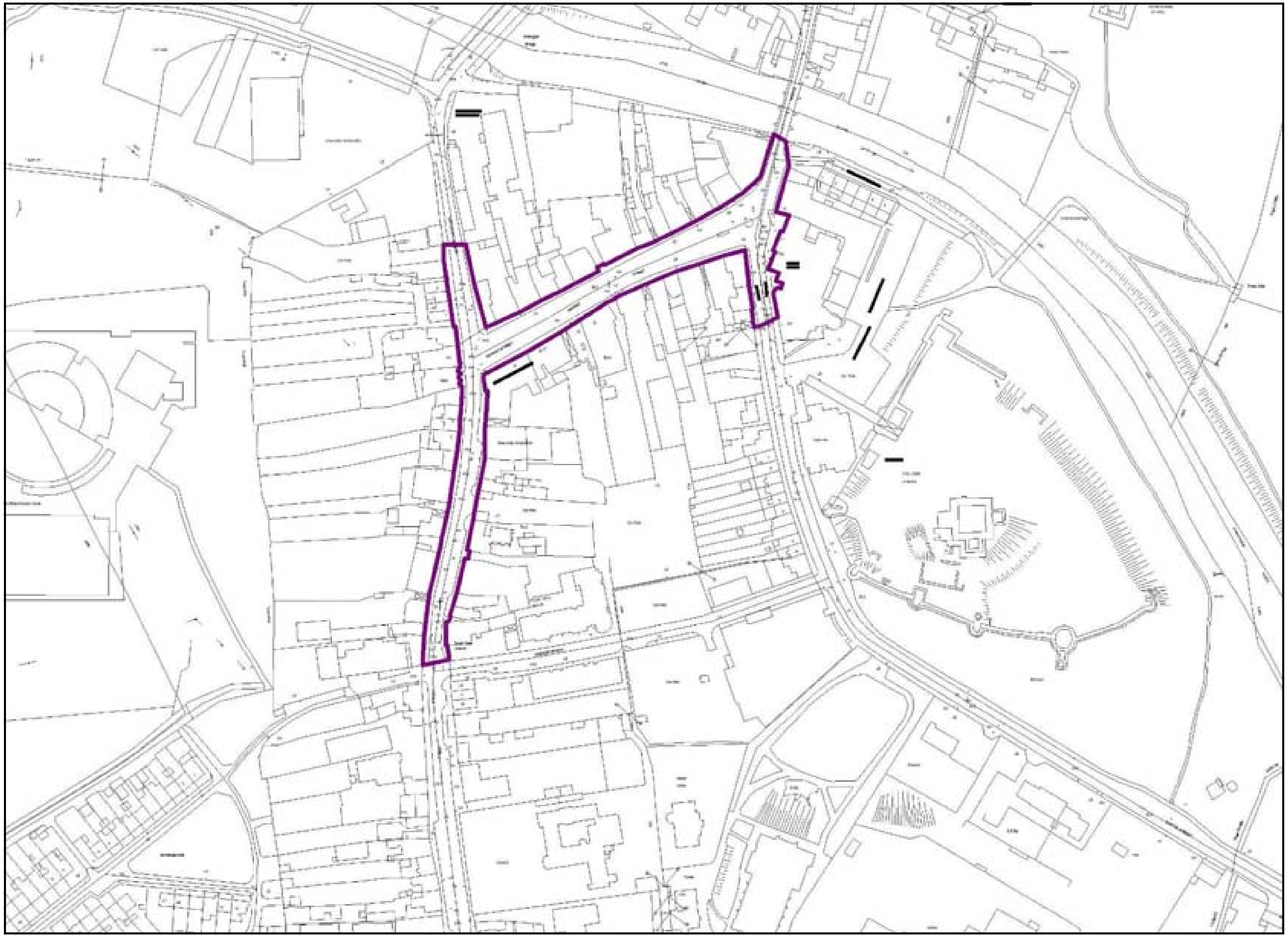


Figure 5.19: Trim Core Retail Frontage

Attractions

5.4.5 Trim's primary attraction is as a Heritage Town which contains Trim Castle and a number of other important archaeological sites and buildings of conservation value, as well as the setting on the River Boyne. Trim has a compact town centre with a good mix of retail uses and supporting services located in the town centre area. However, as acknowledged in the SWOT analysis, the representation of national and international multiples in the town is somewhat weak for a town of its size.

5.4.6 Trim has a good range of pubs, restaurants and hotels which cater for visitors and in particular tourists to the town. Trim Castle Hotel is a recent addition to the town and is a high quality development located on the junction of Castle Street and Finnegan's Way. The Castle Arch Hotel is located on Summerhill Road and the Knightsbrook Hotel and Golf Resort is located off the Dublin Road in Iffernock on the edge of Trim.

5.4.7 A number of recent developments within the historic core of Trim have been of a high architectural and urban design quality, such as the OPW Headquarters, Trim Castle Hotel and the Courthouse building. These developments complement and respect the character of the town and surrounding area.

5.4.8 It is apparent that there has been significant investment in the historic core of Trim town centre as the general appearance of the town is good with good quality footpaths and street furniture. This approach should be extended onto adjoining streets in Trim which haven't benefited from this investment to date.

5.4.9 Trim also has a good range of recreational facilities which includes golf and pitch and putt facilities, new swimming pool / gymnasium (Aura Leisure Centre), modern GAA facilities, including a gym, soccer and tennis grounds. Trim also has a designated walking route and children's playground, while the River Boyne offers a ready resource for anglers and other water based activities. A state of the art library is also located on High Street.

Accessibility

5.4.10 Trim is readily accessible from the national road network, being located at the junction of a number of regional roads, and within 15 km of the M3 motorway. Travel time by private car to Dublin city is less than one hour.

5.4.11 Trim is also accessible by bus, with Bus Eireann operating a number of services through Trim, most notably the service to Dublin, with services operating every half hour. Bus Eireann also serves Kells, Navan and Dunshaughlin.

5.4.12 The traffic system within the historic core of Trim appears to work efficiently and there is good provision of town centre parking spaces, with surface car parks located at Emmet Street, Finnegan's Way and off Watergate Street.

5.4.13 The standard of footpaths and pedestrian crossings are generally good, reflecting the continued investment in Trim's public realm. However, consideration could be given to making the core retail area; and Market Street in particular, more pedestrian friendly.

5.4.14 Pedestrian movement through the historic town centre area is generally a pleasant experience, assisted by the historic buildings, good quality public realm, and the generally well maintained shopfronts.

Environmental Quality / Amenity

5.4.15 The town centre is generally well presented. Street paving, street furniture and public lighting are of a good standard and well maintained. Litter bins are provided throughout the town and would appear to be sufficient.

5.4.16 Trim, as a Heritage Town, has an attractive streetscape and a number of attractive civic, religious and commercial buildings in the town centre, such as the Courthouse and Trim Castle on Castle Street.

5.4.17 The principal shopping streets are Georgian in character, with narrow plot widths and building heights ranging from two to three storeys generally. Shopfronts are typically traditional in character. There is a low level of vacancy and dereliction in the town centre, although some streets such as Watergate Street and Emmet Street would benefit from redevelopment proposals and further investment in the public realm.

Diversity of Uses

5.4.18 The town centre provides a good variety of low to middle order comparison and convenience goods in a range of retail outlet sizes. It also contains a high percentage of retail service outlets and pubs and restaurants reflecting its important role as a tourist town.

5.4.19 As acknowledged above it is considered that there is an under provision of national and international multiples in this Sub-County Town and this element of Trim's retail offer should be expanded over the coming years. The attraction of additional convenience and comparison operators to the town would cater for the local population and help draw tourists from the principal~~le~~ attractions, including Trim Castle, into the town centre environment.

5.4.20 In recent years significant retail activity, incorporating small independent retailers including a pharmacy, sports shop, men's and women's fashion and a fruit & vegetable shop, have become established on Haggard Street, although accessibility in this area, which operates as a one-way system, remains an issue, notwithstanding the development of the Haggard Street car park.

5.4.21 The town has a limited retail warehouse offer with the Trim Retail Park on the Navan Road the only modern retail park in the town. However, this Retail Park lacks the unit sizes to attract national and international retail warehouse operators.

Multiple Representation

5.4.22 Trim has a very limited level of brand name national and international comparison multiples. There are low levels of vacancy in the town centre so it would appear that the town centre expansion area, to the west of Emmet Street and Watergate Street, and other Opportunity Sites, will have to be brought forward if Trim is to significantly improve its retail offer in this respect.

5.4.23 In terms of convenience provision, Lidl, Super Valu (both located to the north of the town centre) and Spar are the primary retail operators in the town. It had been identified in the previous County Retail Strategy and County Development Plan that additional convenience floorspace is required if Trim is to play an enhanced sub-regional / county role in the shopping patterns of the County. There has been no major addition to the convenience retail offer of the town in the interim period and therefore this deficit in Trim's retail offer needs to be addressed.

Rates of Vacancy

5.4.24 The vacancy rate in the core retail area of Trim town centre is estimated at 10.76%[3]. This is a low vacancy rate which indicates a healthy town centre. There is no particular concentration of vacancies in the town centre as they are evenly spread throughout the streets which make up the core retail area.

5.4.25 The map below indicates the units which were vacant in Trim at the time the survey was undertaken.

[3] Ground floor units within defined core retail area only, including under construction

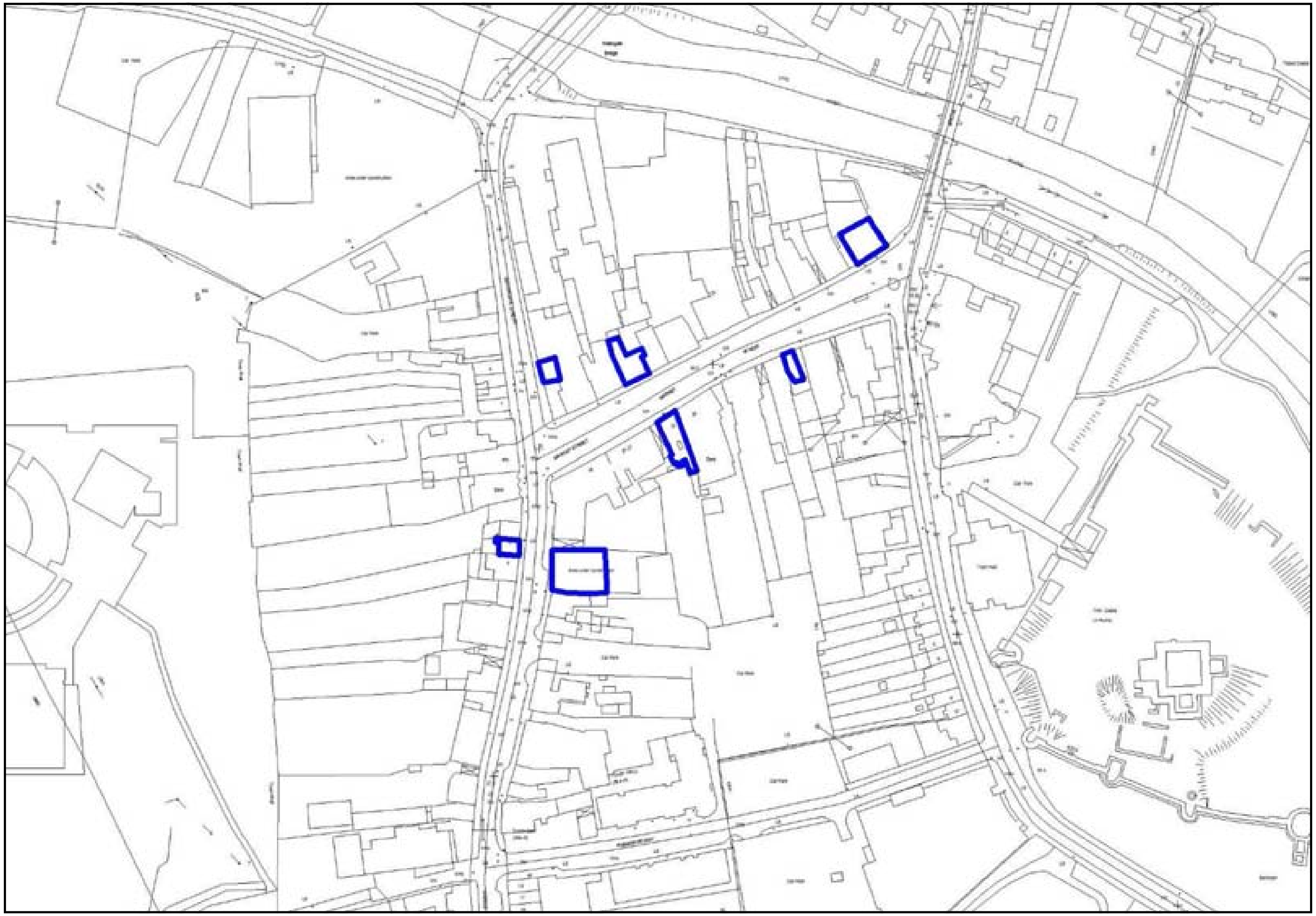


Figure 5.20: Vacancies in Trim

Significant Changes to the Retail Environment Since 2003

5.4.26 There have been no major additions to the retail offer in Trim since the Meath County Retail Strategy 2003 was prepared. The only notable addition to the retail offer has been the construction of a Lidl discount foodstore on Athboy Road (Reg. Ref: TA30122). This store has recently been extended and now stands at 1,633 sq. m gross.

5.4.27 The Retail Planning Strategy for the Greater Dublin Area (2008) indicates that Trim has 3,026 sq. m. of net convenience floorspace and 4,957 sq. m. of net comparison floorspace. It does not record any retail warehousing floorspace in Trim.

5.4.28 Since the preparation of the Retail Planning Strategy for the Greater Dublin Area (2008) there have been no significant retail developments in Trim which would have added to the convenience or comparison retail floorspace offer of the town. Trim Retail Park, which was originally approved as a Motopark to cater for automotive parts, has been constructed on the Navan Road and contains a furniture store. No other significant bulky comparison stores have been constructed in Trim.

5.4.29 There are also a number of permitted developments, where construction has not yet commenced, which are of relevance. These include the following:

- Full planning permission granted by Trim Town Council in May 2007 and by An Pleanála in October 2007 on part of the town centre expansion lands to the west of Emmet Street and Watergate Street for a large mixed use scheme at Townspark South including an anchor supermarket, 21 retail units, a bar/café, crèche, offices and 144 apartments. This scheme proposed 2,347 sq. m. net of convenience floorspace and 1,733 sq. m. net of comparison floorspace. This scheme has not progressed to date.

- A retail warehouse park development with a GFA of 9,925 sq. m. located on a site at the Dublin Road, Iffernock, Trim was approved by Meath County Council, Reg. Ref. TA/70464, and subsequently upheld on appeal to An Bord Pleanála, Ref.: PL17.229337, who issued a decision to grant permission on the 6th of June 2009. This scheme has not progressed to date.

Retail Opportunity Sites

5.4.30 At present there is a low level of vacancy in the core retail area of Trim. However, there is also an identified need to attract additional comparison and convenience retail floorspace to Trim. There are a number of sites located on the edge of Trim town centre which provide opportunities to improve the retail offer of Trim.

5.4.31 Some of these sites, including the town centre expansion lands to the west of Emmet Street and Watergate Street have already been identified by the Council, while other sites require further investigation in terms of their availability and viability for the provision of new retail development. The location of these opportunity sites is outlined on the map overleaf and they are described in further detail below:

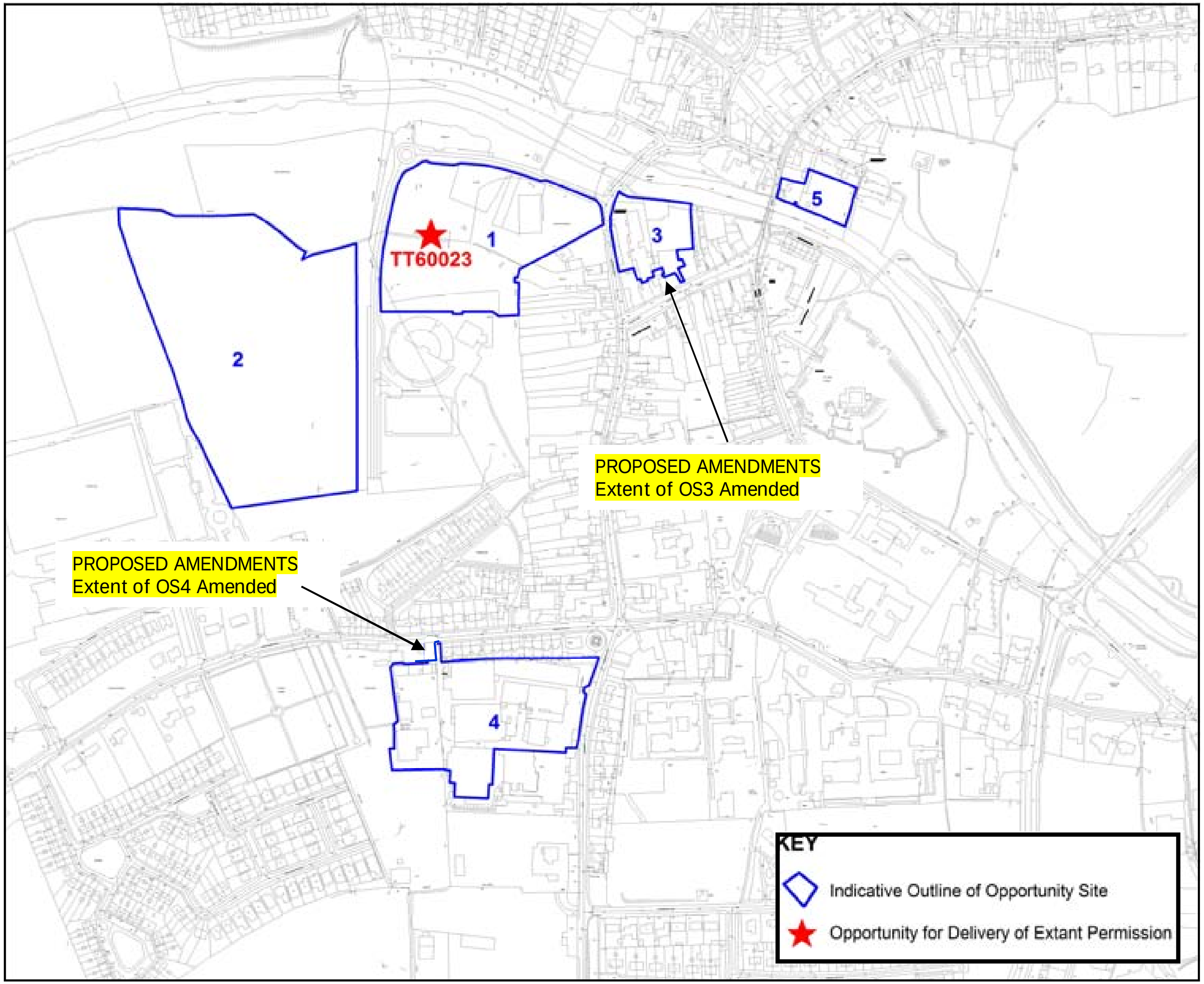


Figure 5.21: Opportunity Sites in Trim

OS1: Site to the west of Watergate Street, east and south of Jonathan Swift Street and north of the OPW Headquarter building. This site has been identified as a town centre expansion area, along with OS2, in the Trim Development Plan 2008 and the Trim Town Centre Local Area Plan 2004. The Development Plan and LAP provide detailed guidance on the design criteria to be applied to the future development of these lands. Of particular importance in the future development of these lands will be improved connectivity to the core retail area.

Photo 5.33: View of OS1 from Watergate Bridge

Photo 5.34: View of OS1 from the roundabout on Jonathan Swift Street

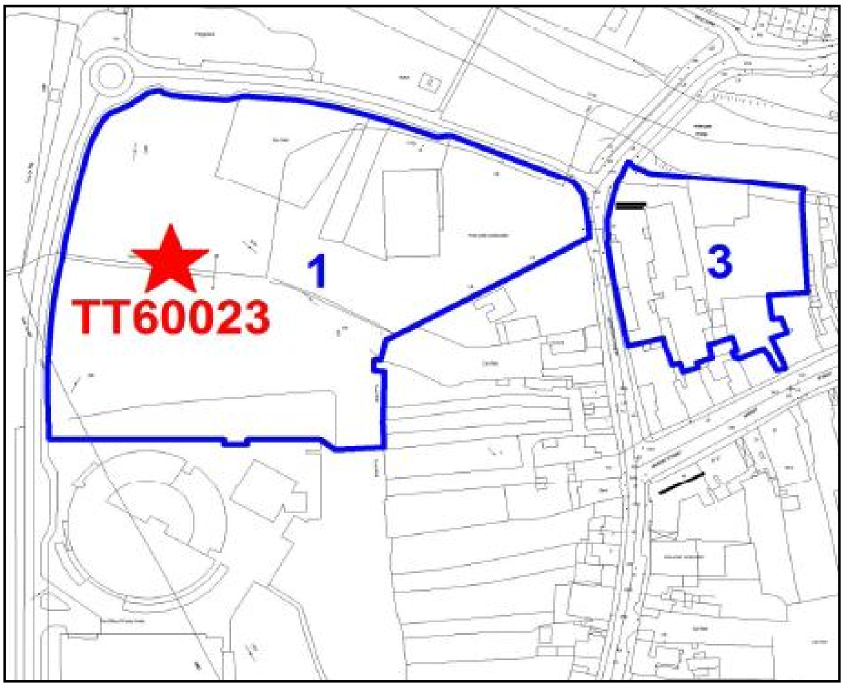


Figure 5.22: OS1 Trim

OS2: This site is located to the west of the OPW offices and Jonathan Swift Street and to the south of the pitch and putt course. The site is located to the south west of OS1. This site has also been identified as a town centre expansion area, along with OS1, in the Trim Development Plan 2008 and the Trim Town Centre Local Area Plan 2004. The Development Plan and LAP provides detailed guidance on the design criteria to be applied to the future development of these lands. Of particular importance in developing these lands for retailing facilities will be the phasing of development and improved connectivity to the core retail area.

Photo 5.35: View towards OPW Headquarters and OS2

Figure 5.23: -OS2 Trim

OS3: Site on Watergate Street. This site is located to the south of the River Boyne with extensive frontage to Watergate Street. The site is currently under-utilised and its redevelopment for mixed use development including retail uses would present the opportunity for a natural extension of the core retail area. The redevelopment of this site for retail uses would also be complementary to the future development of OS1 for retail development by improving connectivity between the existing core retail area and the designated town centre expansion area. This is a relatively small site and the development will need to respect the historic fabric of the town centre.

Photo 5.36: View of OS3 from Watergate Bridge

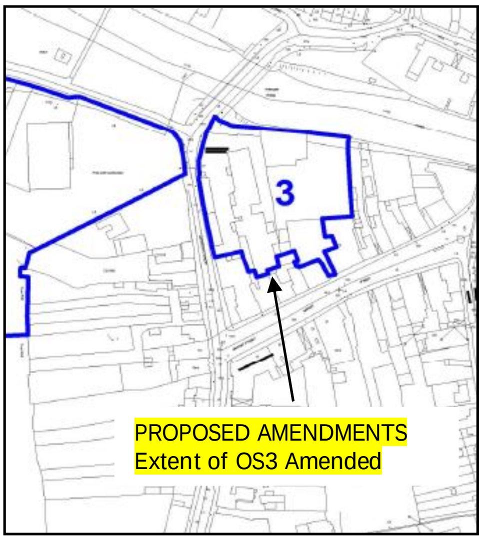


Figure 5.24: OS3 Trim

OS4: This site is located to the west of Summerhill Road and south of the Wellington Monument and Wellington Place. To the south of the site is the Castle Arch Hotel. The site would be considered an edge of centre site. This is a significant landholding with a range of existing uses comprising mainly of single storey buildings and sheds. The site is located in an edge of centre location and would be a suitable location for a mixed use redevelopment including retail facilities. The Planning Authority would need to investigate the availability of these lands and the possibility of relocating existing uses to ensure that a viable site is available to deliver a mixed use scheme in this prominent site to the north of the town centre. The scale, design and massing of the proposed development would need to have regard to the surrounding context which includes single storey residential development and protected structures. There is a significant protected structure on the site (Wellington Court Hotel).

Photo 5.37: View of OS4 from Wellington Place

Photo 5.38: View of OS4 from Summerhill Road

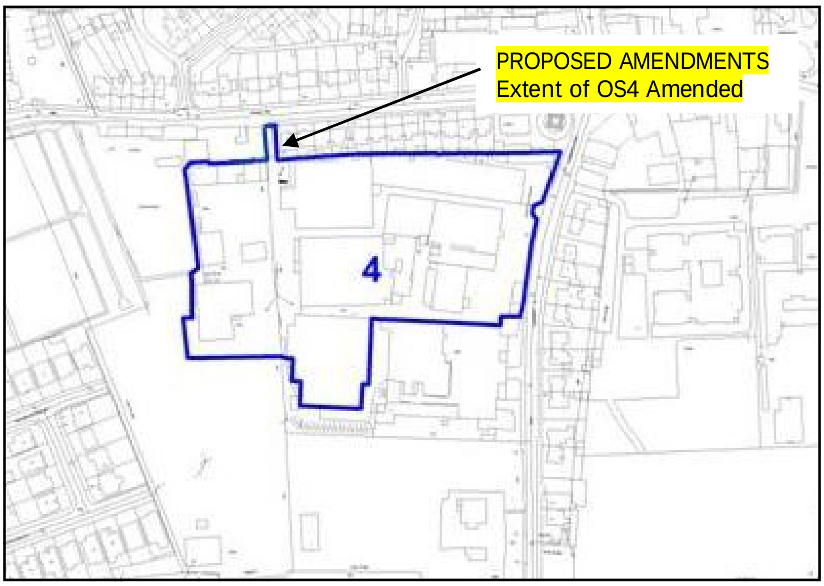


Figure 5.25: OS4 Trim

OS5: This site is located on the eastern side of Bridge Street and to the north of the River Boyne. This site has limited frontage to Bridge Street, currently consisting of a two storey dwelling that appears to be vacant. There is a backland area to the rear. The sensitive redevelopment of this centrally located site could have benefits in extending the core retail area to the north of the River Boyne and improving connectivity between High Street, Bridge Street and Castle Street / Market Street. The site has limited accessibility so it is most likely suited to comparison retail and service uses. Having regard to its location on the River Boyne it could present an opportunity for a high quality restaurant / pub which takes advantage of river views. The site is limited in size and development would need to respect the historic fabric of the town centre and the River Boyne. There may be an opportunity to provide a pedestrian link along the river.

Photo 5.39: Car Park on Church Hill / Fair Green

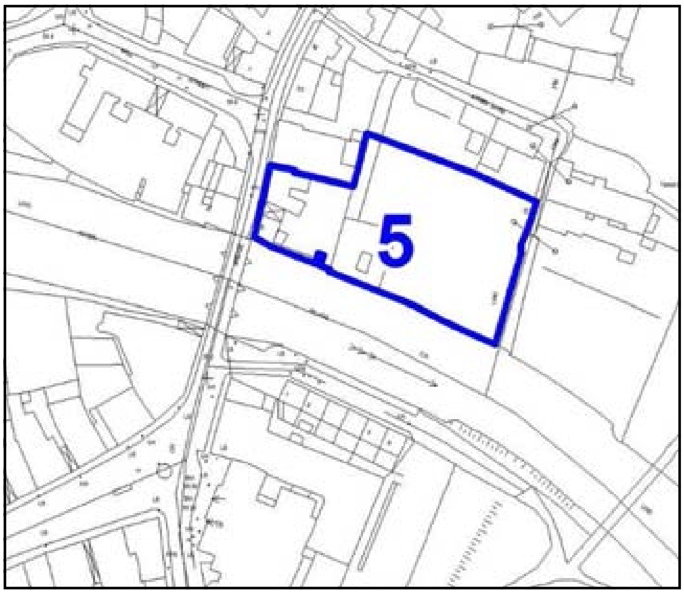


Figure 5.26: OS5 Trim

Key Actions and Recommendations

5.4.32 The key actions and recommendations arising from this health check are as follows:

(i) Identify measures to attract national and international multiples to Trim in order to maintain and improve its role as a Sub-County Town Centre. The utilisation of existing vacant premises in the town centre core area and opportunity sites in the town centre and edge of centre locations should be encouraged. It will be necessary to address the constraints which have been identified in relation to the development of these lands;

(ii) Identify measures to improve the retail environment on Market Street and Emmet Street by improving the pedestrian environment and identifying mechanisms to attract higher order uses and improving the streetscape, such as Special Planning Control Schemes;

(iii) Encourage a greater range of comparison and specialist outlets in the core town centre area to increase the attractiveness of Trim as a retail destination;

(iv) Investigate appropriate opportunities to develop the backland areas for retail, commercial and residential uses to increase the level of footfall in Trim town centre, while also respecting the historic fabric of the town centre;

(v) Proactively work with landowners and other agencies to seek the development of appropriate town centre and edge of centre sites to accommodate additional retail development, overcoming their constraints, and particularly sites which have potential to attract national and international multiples.

Conclusions

5.4.33 Trim has an important role as a tourist destination and has a good quality environment reflecting its status as a tourist destination. However, given its role as a Sub-County Town Centre and the largest urban centre in the south west of the County it is currently under provided for in terms of convenience and comparison floorspace.

5.4.34 The town centre is compact, allowing ease of movement and accessibility for pedestrians between the key retail streets, however a secondary retail core has developed along Haggard Street and the Planning Authority needs to encourage improved connectivity and retail uses from Castle Street along Bridge Street and High Street to Haggard Street.

5.4.35 The town centre has good accessibility by car, and pedestrian permeability is generally good due to the compact form of the town centre. The completion of the M3 has removed through-traffic from the town providing for a more pedestrian friendly environment.

5.4.36 For a Sub County Town, the range of convenience and comparison retailers is considered to be weak. However, the town centre appears to be relatively well served by pubs, restaurants, cafes and hotels reflecting its important role as a tourist destination. However, further comparison and convenience operators, in particular from national and international multiples, would assist with retaining expenditure and increasing the attractiveness of the town as a retail destination.

5.4.37 The core retail area has a low vacancy rate reflecting a healthy town centre and a strong demand for retail floorspace in the prime pitch areas. There are a number of town centre and edge of centre opportunity sites which may be suitable for mixed use development incorporating retail floorspace, providing that constraints can be addressed.

5.5 ENFIELD

Introduction

5.5.1 Enfield is located approximately 42 Km from Dublin and 17 Km from Trim. It is located 1Km north of the M4 motorway. It has developed in a broadly linear fashion along the former Dublin/Galway National Primary Route N4 (now classified as the R148) and its development has had an association with transport uses which traverse the town such as the Royal Canal and the Dublin/Sligo rail link.

5.5.2 The R148 makes up the town's main retail street and is intersected by the R159 (Trim Road) and R402 (Edenderry - Johnstown Bridge Road). Enfield supports a broad range of retail, commercial and professional services, catering for the resident population, surrounding hinterland and through traffic.

5.5.3 Enfield has a rail service to Dublin, good bus connections to Dublin and the west of the country, direct access to the M4 Motorway, and proximity to the Greater Dublin Area.

5.5.4 Enfield is designated as a small growth town in the Meath County Development Plan 2007-2013. It is the objective of the Planning Authority to secure the consolidation and development of Enfield as a sustainable service centre in the south western corner of the Trim Electoral Area.

5.5.5 In the Meath County Retail Strategy 2003 Enfield was designated as a Tier 2 Level 4 Centre- Village Centres. The 2008 GDA Retail Strategy designates Enfield as a Sub County Town Centre. However, the Regional Planning Guidelines for the GDA 2010-2022 designate Enfield as a Small Town. The population of Enfield (and environs) was recorded at 2,161 in 2006 and 2,929 in 2011 (preliminary Census 2011).

5.5.6 The population of Enfield increased from 566 in 1996 to 2,161 in the 2006 Census. Having regard to Enfield's population and its designation in the Regional Planning Guidelines for the GDA 2010-2022, it is considered appropriate to designate Enfield as Small Town Centre in the County Retail Strategy, although it has long term potential to become a Sub County Town Centre.

SWOT Analysis

Strengths

- Enfield is a highly accessible location by both car and public transport. Enfield has a bypass and is also located in close proximity to the M4 motorway.
- Enfield is located within less than 1 hour of Dublin by bus, car and train.
- Enfield has a compact town centre area concentrated on the main street surrounded by significant residential areas to the north and south of the town centre.
- The retail offer of the town centre core is supported by services such as a number of public houses, restaurants and cafes to meet the demands of visitors. The presence of the Johnstown House and Hotel is also notable.

- Enfield has good quality streets, footpaths and cycle lanes within the town centre.

Weaknesses

- Enfield has on street car parking, however, the provision of an additional surface car park in the town would facilitate the opportunity for increased footfall within the town.

- Enfield has a limited convenience and comparison offer reflecting its historic function as a village centre.

- Enfield has a mixed quality built environment with a mix of building types and sizes.

Opportunities

- Enfield benefits from a bypass and is located within 1 km of a junction on the M4 motorway. There is potential to create a more pedestrian friendly environment, for example through traffic calming measures, in the town centre and to discourage through traffic thereby creating a more pleasant retail environment.

- There are a number of vacant and underutilised sites in the core retail area and on the edge of the town centre. Having regard to Enfield's potential for growth as a settlement there is an opportunity to provide additional retail floorspace on infill and edge of centre sites.

- A Tesco Express has been permitted on the southern side of the main street at the eastern end of the town. This will enhance the convenience floorspace provision in the town.

- The core retail area of Enfield is relatively compact and there are opportunities to increase the range and intensity of retail uses within this core area.

Threats

- Enfield has developed as a commuter town within the GDA and although it has an expanding population there is a risk that it will remain a dormitory town with an under utilised town centre.

Definition of Core Retail Area

5.5.7 Enfield's core retail area is concentrated on the Main Street and also extends onto the Johnstown Road. The core retail area extends to the Centra store on the eastern end of the Main Street which also reflects the proposal for a Tesco Express on the southern side of Main Street at the eastern end of Main Street.

5.5.8 The Core Retail Area is rather elongated with a broad mix of uses, including non-retail uses, including residential, interspersed along the street. Significant opportunities exist for improvement in the core retail area of Enfield through infill retail developments and the development of opportunity sites on Main Street.

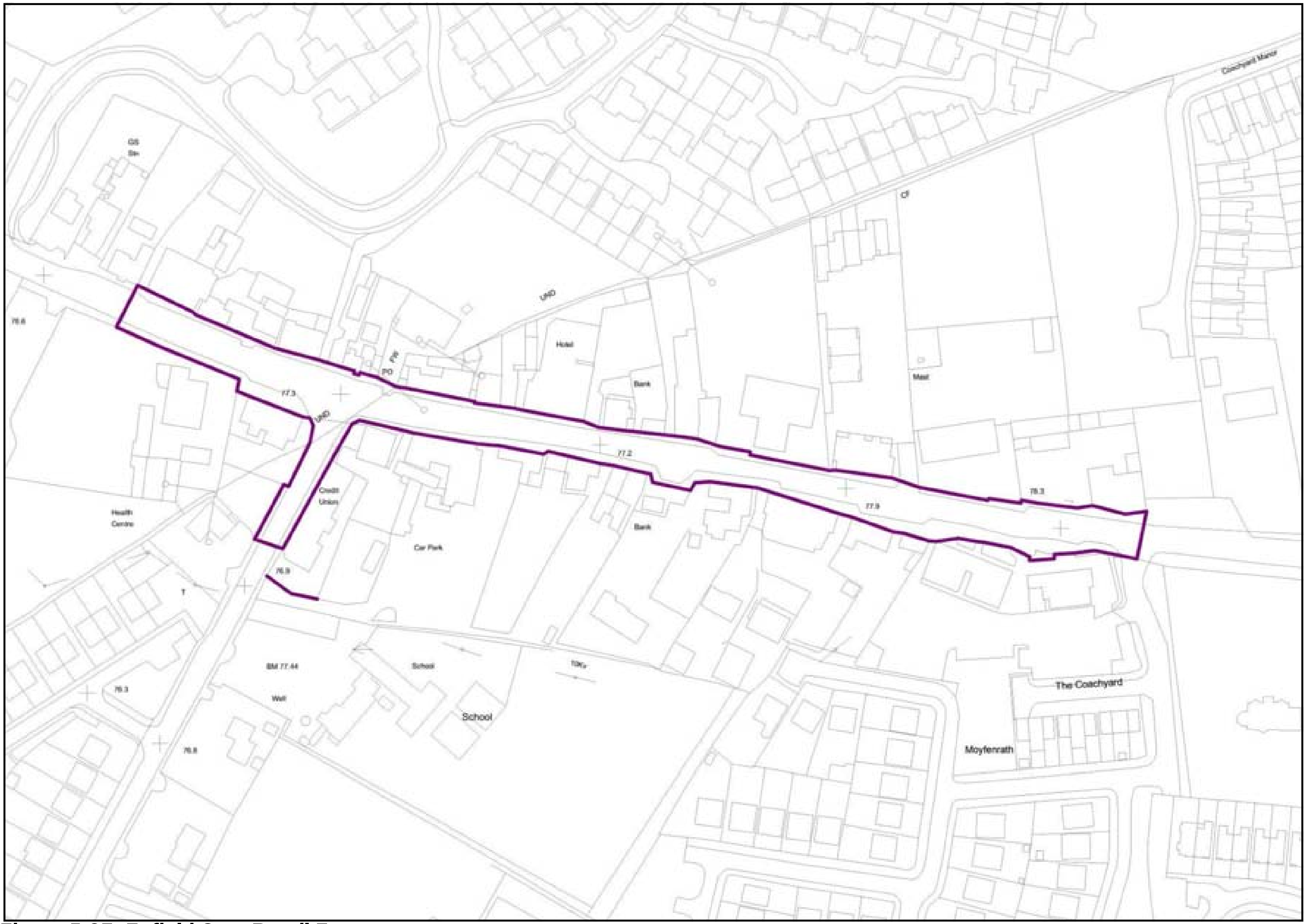


Figure 5.27: Enfield Core Retail Frontage

Attractions

5.5.9 Enfield is located on the Royal Canal. The Royal Canal, with the associated Leisure Activity and Boating Centre is the primary open space in Enfield located at the western end of the town.

5.5.10 Enfield has a good range of retail, services and pub / restaurant / café facilities for a small town, which reflects its location on the N4 national route to Dublin.

5.5.11 Enfield contains a large range of community facilities which include a Health Centre, a boat centre, Leisure Park, an Oratory, a Community Hall, a Garda Station and a Post Office. Enfield also contains a Soccer and a GAA Club as well as a Youth Club and an Athletics Club. Thus, it has a wide range of facilities to cater for the local population and the surrounding hinterland.

5.5.12 The quality of the road surfaces, footpaths and street furniture in Enfield is good and through the incorporation of further traffic calming measures and pedestrian infrastructure improvements Enfield has potential to become a pleasant local retail environment.

Accessibility

5.5.13 Enfield is a very accessible town within the GDA as it is located on the old N4 road, has a town bypass and is located 1 km to the north of the M4 motorway Enfield Junction.

5.5.14 Enfield has a rail station located on the Dublin to Sligo rail line. Enfield also has a good quality bus service, being served by Bus Eireann and a number of private operators who offer frequent services to Dublin and Galway, serving towns in between also.

5.5.15 The town centre no longer suffers from traffic congestion due to the town bypass and the M4 motorway. However, it still has a good degree of through traffic. Efforts should be made to encourage all through traffic to use the town bypass by promoting traffic calming and pedestrian improvement measures in the town centre.

5.5.16 There is on street car parking available in the town and a number of premises have ‘customer only’ surface car parking provided to the rear and side of their properties. T~~t~~he provision of a public car park as well as measures to encourage more intensive use of ‘customer only’ car parking spaces and measures to encourage greater turnover of the parking spaces on the Main Street should be investigated.

5.5.17 The standard of footpaths and pedestrian crossings are generally good, reflecting investment in Enfield’s public realm. However, consideration could be given to making the core retail area, i.e. Main Street more pedestrian friendly.

Environmental Quality / Amenity

5.5.18 The town centre is concentrated on Main Street and it suffers from a lack of identity and character with a broad mix of buildings of different styles from different eras. Any new additions to the streetscape, on infill sites or opportunity sites, should be of a high architectural quality in a modern architectural idiom to enhance the built environment of Enfield.

5.5.19 Street paving, street furniture and public lighting is of a good standard and well maintained, however, the town would benefit from traffic calming and pedestrian infrastructure improvement measures. In addition the excessive wirescape detracts from the appearance of the town.

Photo 5.40: View west along Main Street

Diversity of Uses

5.5.20 The town centre provides a good range of retail and service uses, however, there is some potential to expand its convenience and comparison retail offer having regard to its expanding population and increased importance as a settlement centre in County Meath. Retailing is likely to remain modest in scale having regard to the relatively small population.

5.5.21 The town also contains a good range of retail service outlets and pubs and restaurants to cater for the existing population and the surrounding hinterland.

5.5.22 Enfield is no longer on a national route for traffic travelling to and from Dublin and therefore it acts primarily as a service centre for the town and the local area. In this regard it is acknowledged that there are considerable opportunities for infill developments on Main Street and a number of Opportunity Sites which could contribute to expanding the retail offer of Enfield.

Multiple Representation

5.5.23 Enfield as a small town contains a number of national convenience retailers including Centra, Daybreak, Gala and Londis. In addition planning permission has been granted for a Tesco Express on the eastern end of Main Street which will enhance the convenience retail offer of the town.

5.5.24 Having regard to its current size, there may be limited market demand for other national and international convenience or comparison retailers at present. Notwithstanding this a number of sites have been identified for future retail development and the scale of development to be permitted would need to be subject to a Retail Impact Assessment.

Rates of Vacancy

5.5.25 The vacancy rate in the core retail area of Enfield is estimated at 8%[4]. The vacancy rate in the core retail area is therefore low which indicates a healthy town centre with a good demand for retail units. As acknowledged above there is a high percentage of units within the core retail area which are currently not in retail use and in addition there are opportunities for infill development which would help create a more compact town centre.

5.5.26 The map overleaf indicates the units which were vacant in Enfield at the time the survey was undertaken.

[4] Ground floor units within defined core retail area only, including under construction

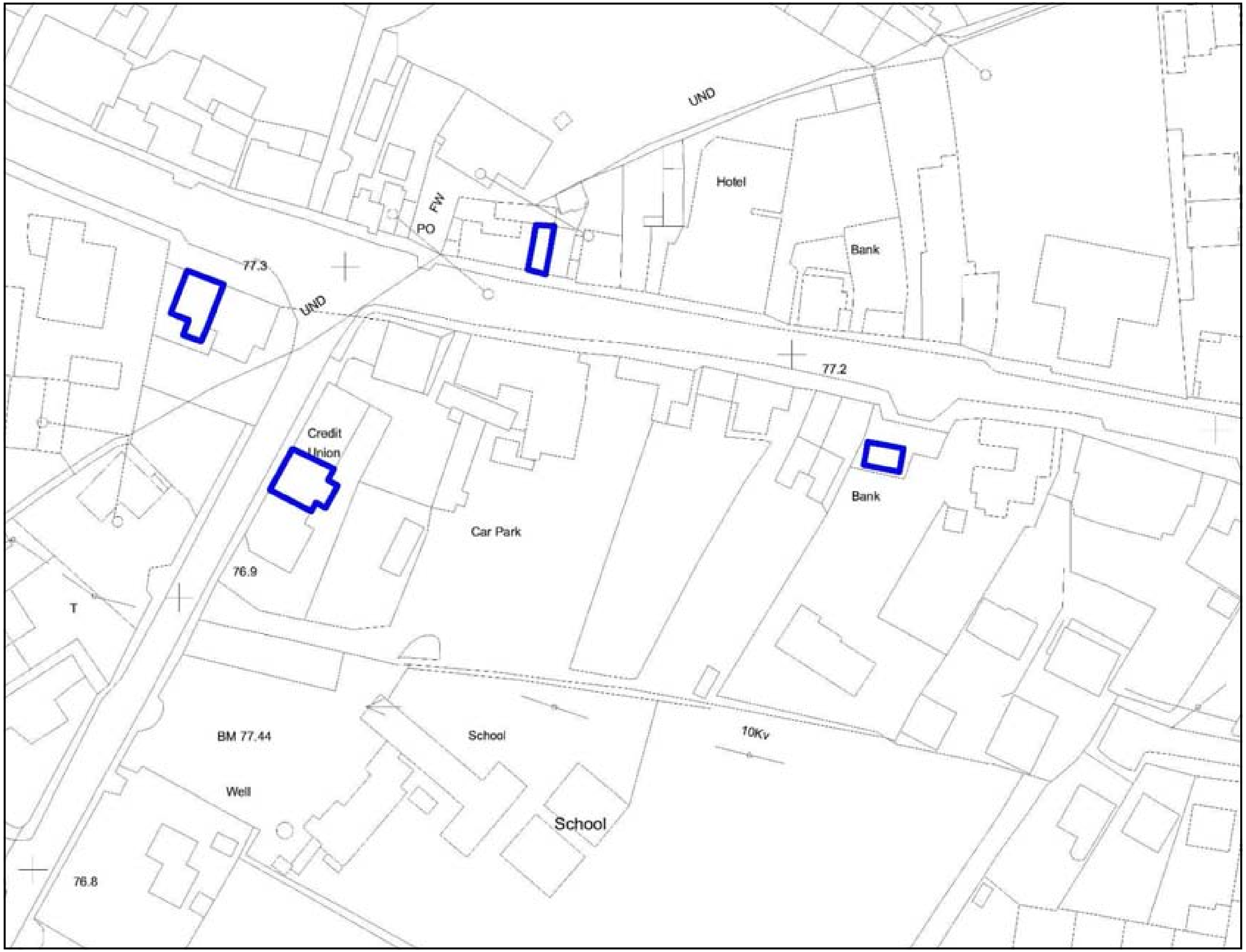


Figure 5.28: Enfield Vacancies

Significant Changes to the Retail Environment Since 2003

5.5.27 Enfield was designated as a Tier 2 Village Centre in the Meath County Retail Strategy 2003 and therefore a detailed analysis of the Enfield's retail floorspace was not carried out at this time.

5.5.28 It is noted that planning permission was granted under Reg. Ref.: TA110204, and upheld on appeal to An Bord Pleanála, Ref.: PL 17.239297 for a Tesco Express at the eastern and southern side of Main Street. Construction has now commenced on this development. This will be a significant addition to the town's convenience retail offer.

Retail Opportunity Sites

5.5.29 We have indicated a relatively large core retail area for Enfield which reflects the linear manner of the towns' development along the N4 / Main Street. Significant opportunities exist for infill developments and redevelopment of opportunity sites in Enfield. These sites offer suitable opportunities for the expansion of Enfield's retail offer.

5.5.30 The location of opportunity sites is outlined on the map overleaf and they are described in further detail below:

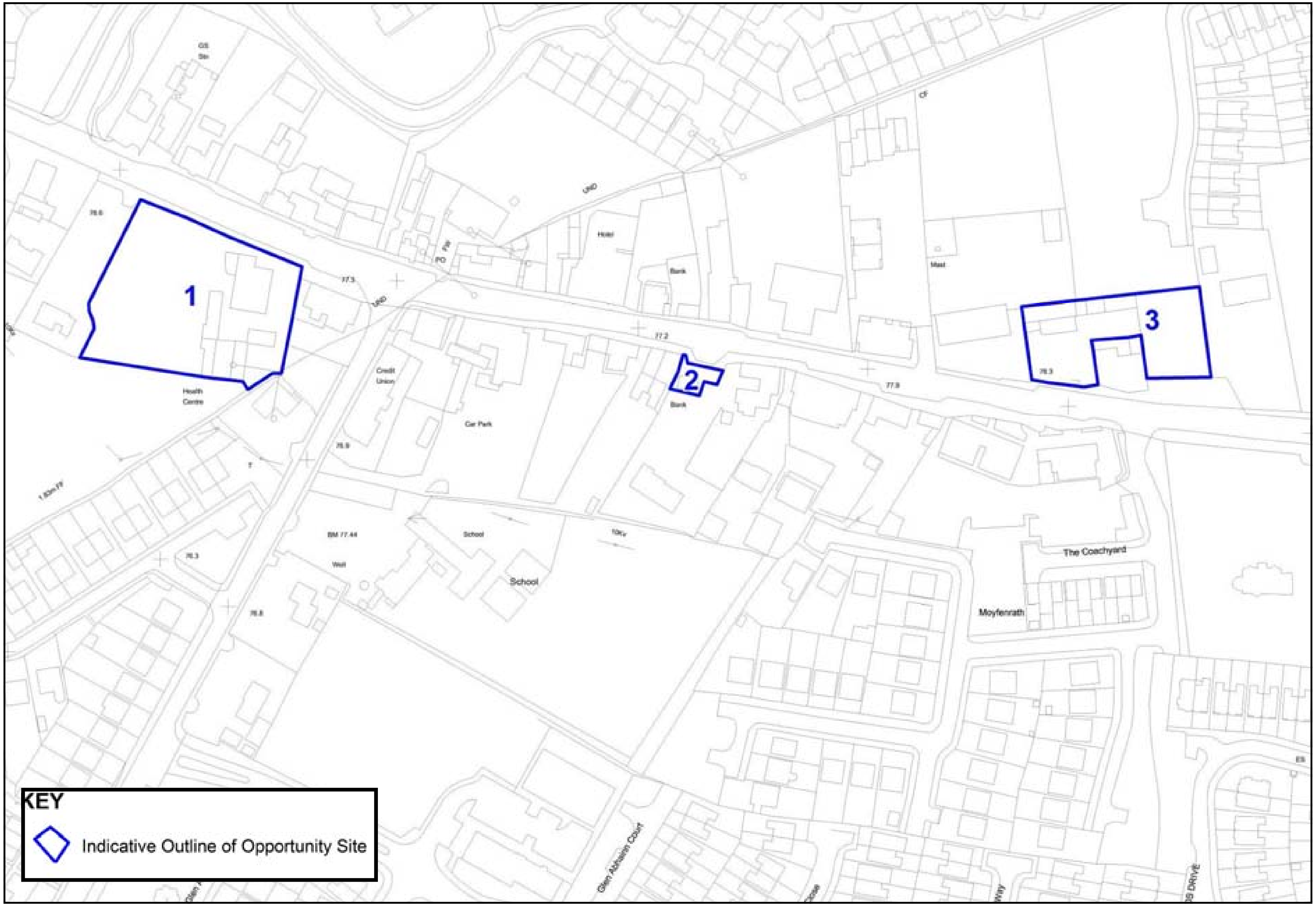


Figure 5.29: Opportunity Sites in Enfield

OS1: Site to the west and south of Main Street. This site is located on the southern side of Main Street and is currently in agricultural use with a number of agricultural buildings present on the site. The site is located on the western edge of the core retail area and offers short term potential for redevelopment. The site is subject to a town centre and a mixed residential and business zoning objective in the current LAP. The site is within close proximity of Enfield train station. High quality architecture and urban design should be sought in the redevelopment of this site to ensure that the built environment of Enfield is enhanced.

Photo 5.41: View of OS1 looking eastwards

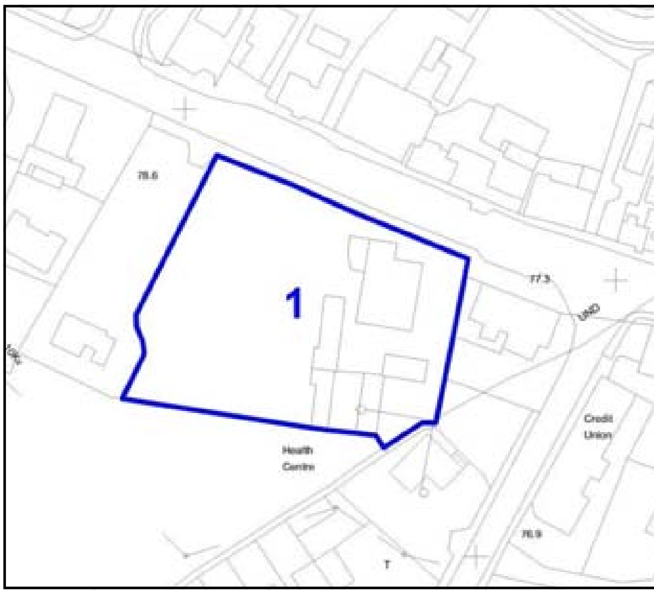
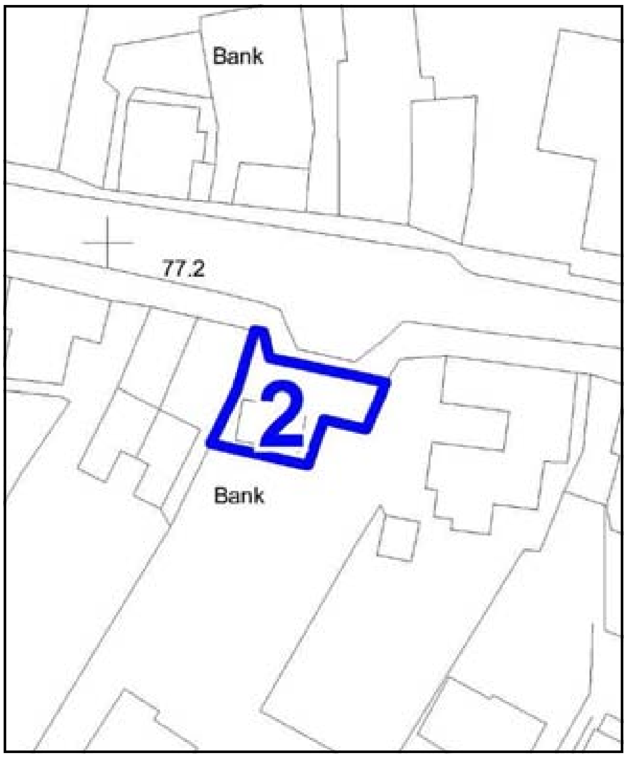


Figure 5.30 OS1 Enfield

OS2 Former Bank of Ireland premises on Main Street. This site is located in close proximity to OS2 and presents an opportunity for re-use of the existing premises, redevelopment of the subject site or redevelopment of the site in conjunction with underutilised adjoining sites which are zoned for town centre development. We would recommend that high quality modern architecture and good urban design is a prerequisite for redevelopment on this site.



OS3 This site is located at the eastern end of Main Street and forms part of the Centra site. Although the Centra store has been developed on this site there is a significant portion of land to the east and rear which would benefit from redevelopment as it is underutilised at present and detracts from the built environment of the town. The scale, design and massing of the proposed development would need to have regard to the surrounding

context which includes single storey residential development and protected structures.

Photo 5.42: View of OS3 from Main Street

Figure 5.31 OS2 Enfield

Photo 5.43: View of OS3 looking westwards

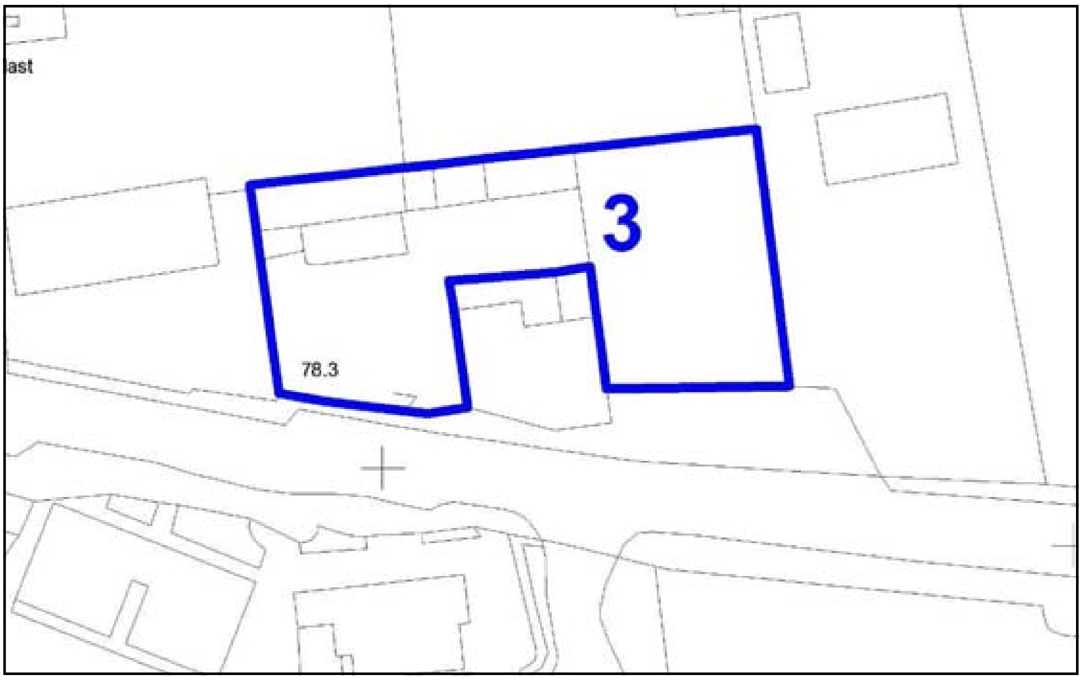


Figure 5.32 OS3 Enfield

Key Actions and Recommendations

5.5.31 The key actions and recommendations arising from this health check are as follows:

(i) Enfield is a settlement which has potential to expand having regard to its strategic location on the M4 motorway and the Dublin to Sligo rail corridor;

(ii) Identify measures to improve the retail environment on Main Street by improving the pedestrian environment and attracting high quality developments and users to infill and opportunity sites;

(iii) Facilitate opportunities for additional retail / commercial uses to occupy under utilised town centre sites;

(iv) High quality architecture and urban design should be promoted in any future redevelopment to enhance the built environment in Enfield.

Conclusions

5.5.32 Enfield is a highly accessible location with good public transport links. It has been upgraded to a 'Small Town' in the Regional Planning Guidelines and was designated as a 'Sub County Town Centre' in the GDA Retail Strategy. It is considered that the latter reflects its long term potential.

5.5.33 The core retail area has developed in a linear fashion along Main Street and there is an opportunity to consolidate retail and commercial functions within this area and identified opportunity sites. This will ensure that the town centre develops in a compact fashion. However, the potential for further retail development is limited having regard to the relatively low population.

5.5.34 The town centre has good accessibility by car although the provision of a public car park would enhance the retail experience in the town and result in less congestion on the main street. The possibility of introducing further traffic calming, including a HGV ban, and pedestrian improvement measures on Main Street should be investigated further.

5.5.35 The core retail area has a low vacancy rate reflecting a strong demand for retail floorspace in the prime pitch areas. There are a number of town centre and edge of centre opportunity sites which should be identified as being suitable for mixed use development incorporating retail floorspace.

5.6 Bettystown

Introduction

5.6.1 Bettystown is located on the east coast, south of Drogheda and close to the M1 and benefits from commuter rail services that stop at Laytown. Bettystown forms part of the Laytown-Bettystown-Mornington cluster. The town is the largest retail centre in the cluster.

5.6.2 The town has witnessed considerable residential development over recent years due to its accessibility to both Dublin and Drogheda by road and rail.

5.6.3 The 2006 Census recorded a population of 8,978 persons in the Laytown-Bettystown-Mornington conurbation in 2006, up 60.4% from 5,597 in 2002. The population recorded in the preliminary 2011 census was 10,889.

5.6.4 Along with Laytown, Bettystown is identified in the Retail Planning Strategy for the Greater Dublin Area 2008 – 2016 as a Level 3 town and / or district centre and sub county town centre. Mornington, to the north of Bettystown, is a small village. The only services present are a Centra, a bicycle shop and a florist.

5.6.5 Laytown forms part of the Laytown-Bettystown-Mornington cluster. It is located on the east coast, south of Drogheda, close to the N1 and has the benefit of direct access to Dublin-Belfast rail services. The centre has developed in two small clusters of shops and other services along the main street. It is a small retail centre with the majority of shopping needs being currently met in Drogheda.

5.6.6 As Bettystown performs the retail function for the Laytown-Bettystown-Mornington cluster, this health check examines Bettystown principally.

~~5.71~~ SWOT Analysis

Strengths

- A key asset is the town's coastal location and attraction which could be enhanced to the benefit of local people and visitors alike. The town is a popular destination during the summer months, and is assisted by facilities such as Funtasia, an entertainment facility located in the town centre.

- Parking in the town centre generally appears to be sufficient, with a combination of on-street parking and off-street parking, most notably to the rear of Centra in the traditional town centre, and a significant quantum of car parking at Bettystown town centre. There is no paid parking in operation, except for paid parking on the beach which can result in visitors to the beach utilising the free on-street parking.

Photo 5.44: Bettystown Traditional Town Centre

Photo 5.45: Retail on Triton Road looking towards Bettystown Town Centre

Weaknesses

- The town centre has been impacted upon by a large scale development to the west of the town, at an edge of centre location. This mixed use development is anchored by Tesco, and includes additional retail units, residential development and a hotel development.

- With the exception of Tesco, all retail units in the development are currently vacant and the Bettystown Court Hotel, which operated since June 2006, is now closed.

- Traffic congestion can be experienced at peak hours, principally associated with movements to and from Laytown train station.

- There is now no hotel serving Bettystown and this impacts negatively upon the attractiveness of the town to tourist visitors in particular.

- Paid parking on the beach can result in visitors to the beach utilising the free on-street parking. This can lead to congestion in the traditional town centre, particularly during summer months.

Opportunities

- There are a number of vacant retail units located in the recently completed edge of centre development to accommodate additional retail development in Bettystown.

- There is also a town centre opportunity site identified which could accommodate additional development in order to provide a sufficient range of retail to meet the needs of the catchment area.

Threats

- Threats to retailing in Bettystown are primarily due to the proximity of competing centres, most notably Drogheda, and particularly the Southgate development in Colpe Cross at the southern end of Drogheda, which is anchored by Dunne's Stores.
- Sufficient retail provision is required in Bettystown to ensure that there is not undue leakage to surrounding competing centres.
- The unfinished mixed use development at Bettystown Town Centre is a threat to the vibrancy and viability of the centre itself.

Definition of Core Retail Area

5.6.7 Bettystown effectively has two distinct town centre core areas following the completion of the edge of centre development to the west of the traditional town centre.

5.6.8 The traditional town centre is concentrated on Strandview Terrace and Golflinks Road along the sea-front and also The Anchorage and Triton Road leading west towards the Bettystown Town Centre development. The traditional town centre includes uses such as a Centra convenience store, an independent convenience store in The Anchorage development, a public house, a take-away, a restaurant, a café, a video rental shop, a pharmacy, a health and beauty shop, a post office, and a party and household shop.

5.6.9 The Bettystown Town Centre, located to the west of the traditional town centre, is anchored by Tesco, and includes circa 177 no. apartments, a 84 no. bedroom hotel, which has now ceased trading, and a number of ground floor retail units. Whilst Tesco is operating, no other ground floor retail units were occupied. The total retail floorspace permitted was circa 13,000 sq. m. net.

5.6.10 Retailing in Laytown is concentrated in two areas, one at Alferno Terrace adjacent to the train station, which provides a convenience supermarket, a restaurant, a bookmakers and a take-away. The Alferno Hotel is located adjacent to this centre also, removed from the street frontage. The second area of retailing is on the Strand Road leading towards Bettystown where there is a general goods store / comparison supermarket, a take-away and a pharmacy.

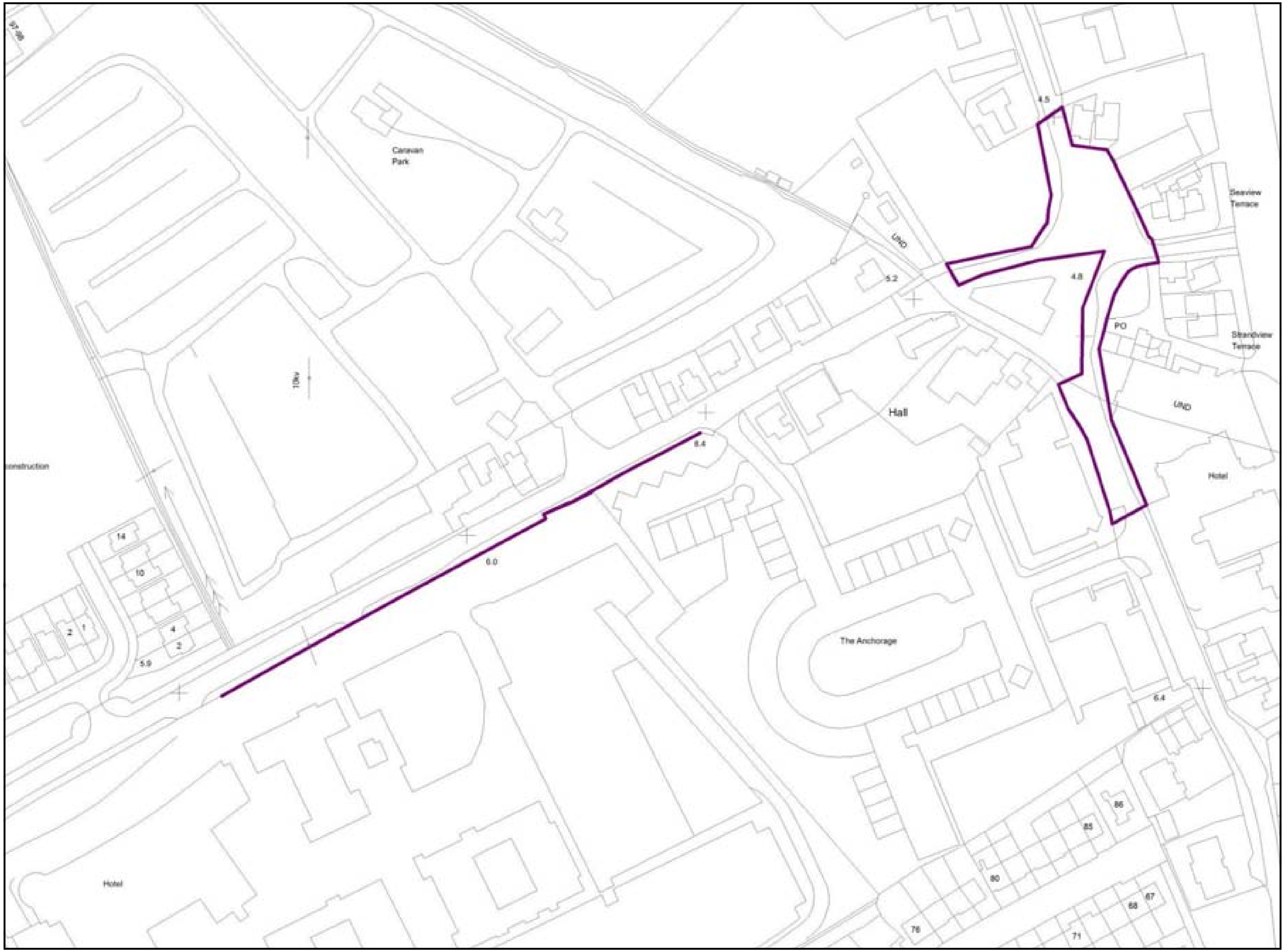


 Figure 5.33: Bettystown Core Retail Frontage

Attractions

5.6.11 The location of the town is the key attraction for Bettystown. Located on the east coast, the town has an attractive beach and offers some complementary uses such as Funtasia, an amusement park with a variety of attractions, a golf course and a dive centre offering a range of courses, trips to local dive sites and organised trips further afield. Funtasia opens on a seasonal basis. Laytown and Bettystown golf club is also an attraction.

Accessibility

5.6.12 Bettystown is relatively easily accessible by car by way of the M1 road network, which connects Dublin to Belfast and serves surrounding centres such as Balbriggan to the south and Drogheda to the north.

5.6.13 There is no train station in Bettystown. The nearest train station is at Laytown, approximately 1.3 kilometers to the south, which is on the Dublin to Belfast line and is served with commuter services on a regular basis.

5.6.14 Matthews Bus provides a service every hour between 6 am and 11 pm connecting Drogheda with Dublin, and serving Bettystown as well as Laytown.

5.6.15 The traditional town centre is compact and easy to negotiate by foot. Connections with the Bettystown Town Centre development by way of Triton Road are of relatively poor quality.~~.~~

5.6.16 Laytown is accessible by commuter rail, being located on the Dublin to Belfast line and is served with commuter services on a regular basis.

Environmental Quality / Amenity

5.6.17 Environmental quality and amenity in Bettystown would benefit from improvement.~~.~~ Whilst The Anchorage development is generally of a good visual quality, the remaining town centre area generally would benefit from improved hard and soft landscaping. Footpaths however are generally well maintained and litter bins are frequent.

5.6.18 The Bettystown Town Centre development, whilst finished to a high-quality suffers from low occupancy levels and this leads to a poor quality environment. Whilst paving, lighting and soft landscaping are of high quality, the area is under-utilised.

Diversity of Uses and Multiple Representation

5.6.19 There is a relatively good provision of convenience retail in the town, particular with Tesco, in addition to Centra and a relatively large independent supermarket in The Anchorage development in the traditional town centre.

5.6.20 Comparison offer is weak. There are no fashion or clothing outlets, and with the exception of a party and household outlet, there is no notable comparison retailing in the town.

5.6.21 The traditional town centre generally provides a number of retail services such as a bookmakers, a butcher, a pet store, a dry cleaners and a post office. There is no library or financial institutions present.

5.6.22 Only basic retail services are provided in Laytown. Retailing needs, save for basic convenience needs, are served by adjacent centres such as Bettystown. There is no multiple representation in Laytown.

Rates of Vacancy

5.6.23 The vacancy rate in Bettystown is estimated at 30.5%[5], presuming the presence of 10. no. vacant units at the Bettystown Town Centre development. The majority of the vacancy, however, is at Bettystown Town Centre. Only one vacancy was recorded in the traditional town centre, which provides a vacancy rate of 8.3%.

5.6.24 The map overleaf shows the locations of vacancy in Bettystown. The vacancies shown in Bettystown town centre are split into multiple units.

5.6.25 No vacant units were noted in Laytown. This is not surprising considering that only basic retail services are provided in the town and there are a limited number of units.

Photos 5.46 and 5.47: Bettystown Town Centre with vacancies

[5] Ground floor units within defined town centre core area only

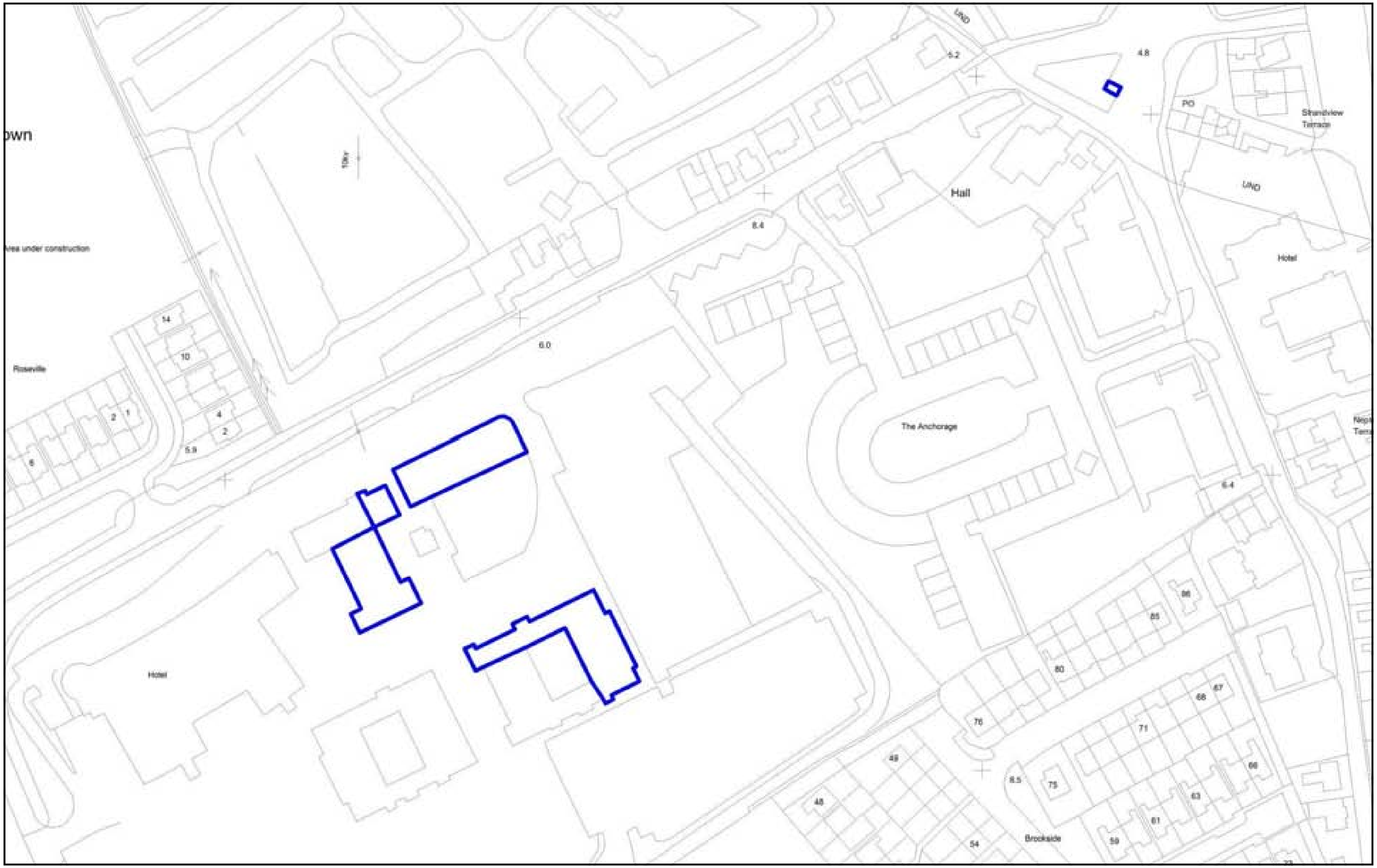


Figure 5.34: Location of Vacant Units in Bettystown

Significant Changes to the retail Environment Since 2003

5.6.26 The Retail Planning Strategy for the Greater Dublin Area (2008) indicates that 2,450 sq. m of net convenience floorspace and 450 sq. m. of net comparison floorspace in Bettystown.

5.6.27 Significant retail development has taken place in Bettystown since 2003 in the form of the Bettystown Town Centre development. This mixed use development to the west of the traditional town centre of Bettystown includes Tesco as an anchor tenant, together with a number of ground floor retail units, with residential above. These ground floor retail units remain vacant.

5.6.28 There is no evidence of any other significant retail development in Bettystown since 2003.

5.6.29 The Retail Planning Strategy for the Greater Dublin Area (2008) indicates that 585 sq. m. of net convenience floorspace and 40 sq. m. of net comparison floorspace in Laytown. There is no evidence of any retail developments in the town since 2003.

Retail Opportunity Sites

5.6.30 As can be seen from the vacancy survey outlined above, there are a number of opportunities for retailers to locate in Bettystown. This includes opportunities at town centre locations. There is also significant vacancy in the Bettystown Town Centre development and every effort should be made to encourage the use of these vacant premises.

5.6.31 Notwithstanding the existence of a number of vacant units in the town centre, there is an opportunity site which could be investigated for the provision of new retail development. The location of this site is outlined on the map overleaf and is described overleaf.

5.6.32 Laytown effectively acts as a commuter town, with convenience retailing needs being provided by Bettystown and comparison needs to adjacent centres such as Balbriggan and Drogheda. The location of the town on the Strand means that there is limited opportunity for the expansion of the town centre. It is expected that retail growth will be primarily directed towards Bettystown. In the event that retail development is pursued in Laytown, the following should be investigated:

(i) Infill developments along Alferno Terrace and Strand Road;
(ii) Potential development at the surface car park and adjoining greenfield site opposite Alferno Terrace.


Photos 5.48 and 5.49: Car Park and adjacent greenfield site opposite Alferno Terrace, Laytown

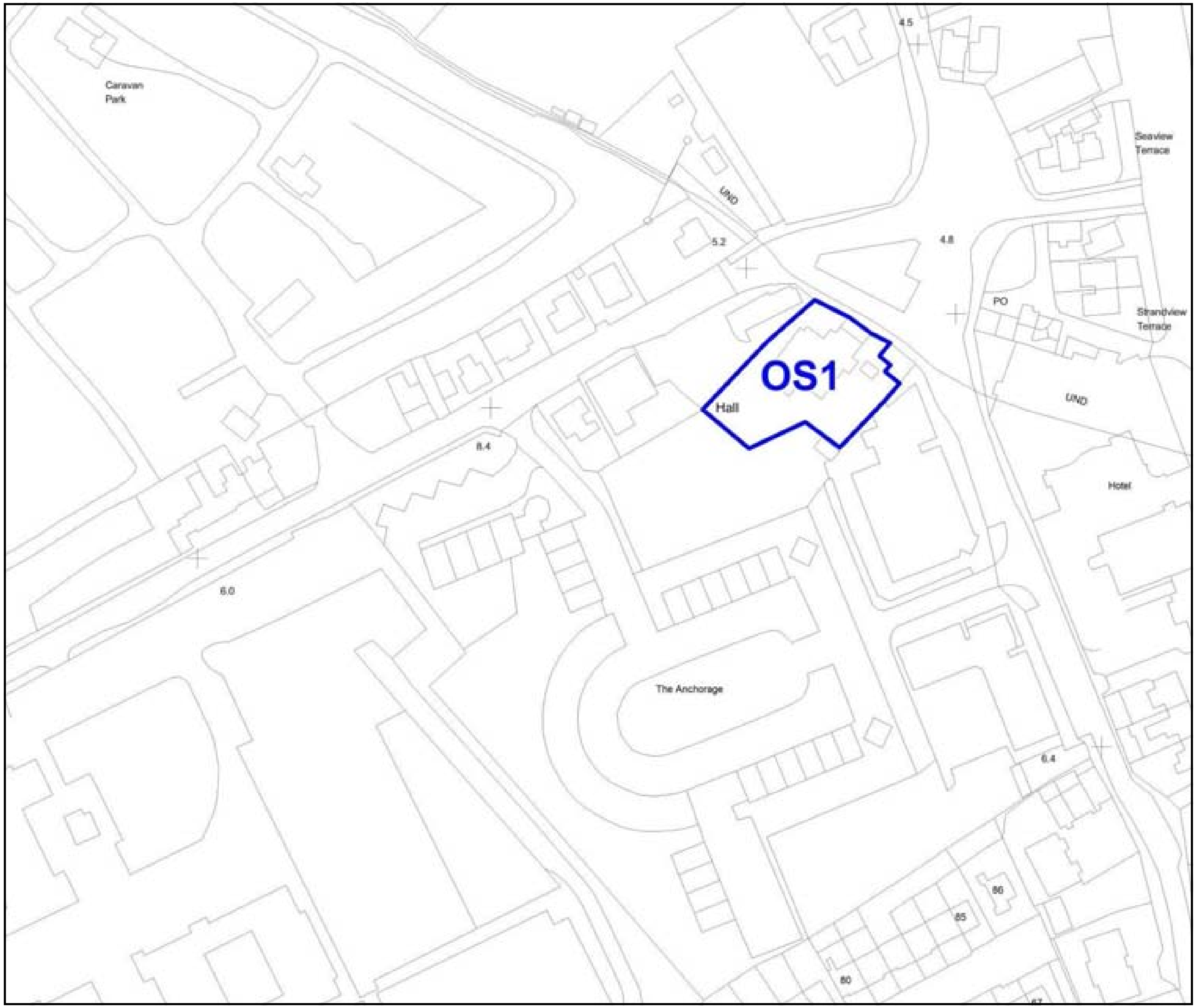


Figure 5.35: Opportunity Sites in Bettystown

OS1: The Anchorage: Located at The Anchorage, a short street which connects Strandview Terrace with Triton Road, this site currently comprises of a one-storey pitched roof building, currently occupied by Bettystown Dance Studio, a temporary vacant portakabin and associated yard. This site is ~~again~~ in a prominent position and its development for retail purposes would assist with providing a physical link between the traditional town centre towards Bettystown Town Centre.

Photo 5.50: OS1 at The Anchorage

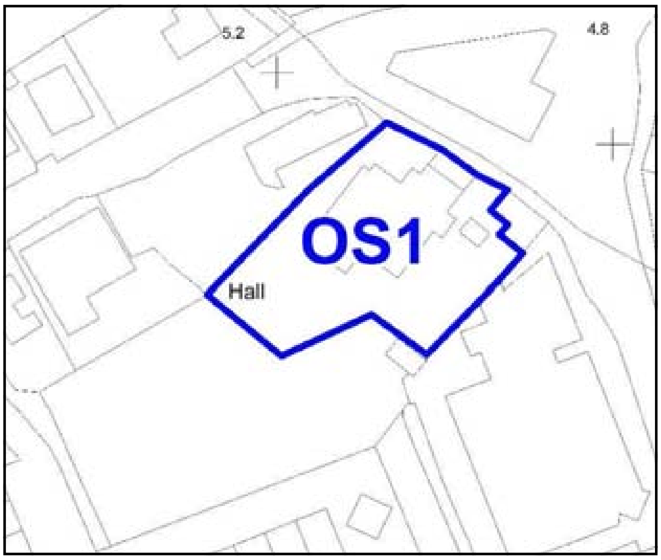


Figure 5.36: OS1 Bettystown

Key Actions and Recommendations

5.6.33 The key actions and recommendations arising from this health check in respect of Bettystown are as follows:

(i) Identify measures to attract more retail to the town generally. Such measures might include incentives to occupy vacant units, improvements to the public realm, and incentives to develop the identified opportunity site. The promotion of uses complementary to tourist visitors, such as gift shops, cafes, etc may be investigated;

(ii) The utilisation of existing vacant premises in Bettystown town centre and opportunity sites in the traditional town centre should be encouraged. Innovative temporary use of such vacant properties should be encouraged in the interim;

(iii) Investigate measures for improvement to the public realm in the traditional town centre generally;

(iv) Promote additional café, restaurant and gift / tourist shops in the town centre in order to attract tourists to the town centre and provide a link with the retail provision in the town;

(v) Promote the improvement of the footpath between the traditional town centre and the Bettystown Town Centre development in order to promote increased linkage between the traditional town centre and the Bettystown Town Centre development.

5.6.34 The key actions and recommendations arising from this health check in respect of Laytown are as follows:

(vii) Recognise the association of Laytown with Bettystown, which is the primary retail service centre in the Laytown- Bettystown-Mornington cluster;

(viii) Support the provision of small to medium scale convenience retail development in Laytown to support the needs of the local community.

Conclusions

5.6.35 Bettystown is performing relatively poorly in terms of its role as a Level 3 Sub-County town in conjunction with Laytown. In order to Bettystown to function in accordance with its role, there will need to be a considerable strengthening of the town's retail offer, particularly its comparison offer. There are a number of constructed units in Bettystown town centre which could go some way to meeting this demand, if occupied.

5.6.36 Furthermore, there are a number of opportunities in the town centre for retail development, particularly on sites which are currently vacant which should be investigated as a priority. There is a need to identify the constraints associated with these sites and how they can be overcome.

5.6.37 There is a good opportunity to seek to attract tourist and leisure visitors to the town centre, and to retain these visitors in the town centre.. The retail offer of the town would benefit from being expanded and upgraded, and additional tourist related facilities such as restaurants, cafes, gift shops need to be provided.

5.6.38 It is also important that linkages be provided between the traditional town centre and Bettystown town centre. Existing linkages along Triton Road are relatively weak and there is an opportunity for an upgrade to the footpath at Triton Road to facilitate improved linkages between the two centre areas.

5.7 Ashbourne

Introduction

5.7.1 Ashbourne is located approximately 20 km north of Dublin and is bypassed by the N2 / M2 route which links Dublin to Derry. The R135 runs through the town centre. The town is approximately 29 km south of Navan.

5.7.2 It is the second largest town in County Meath and consequently the second largest retail centre in the County after Navan. The town has experienced rapid growth in recent years, primarily due to its proximity to Dublin and its growth as a commuter town. The population of the town (including environs) was 8,528 persons according to the Census 2006, an increase of over 34% on the previous census in 2002. The population of the town, including environs, is 11,355 according to the preliminary 2011 Census results.

5.7.3 The growth in Ashbourne's population has lead to expansion of local enterprise and retail to cater for the growing populations needs. Many new retail units have been opened in recent years.

5.7.4 Ashbourne is identified as a level 3 sub county town in the retail strategy for the Greater Dublin Area. It is at the same level of the retail hierarchy as Trim and Kells, yet has a much greater level of retail provision.

SWOT Analysis

Strengths

- Ashbourne serves a large rural catchment area including the retail needs of nearby settlements such as Ratoath, which had a population of 7,249 (including environs)~~10,566~~ in the Preliminary 2011 Census of Population results.
- Retail development in the town has significantly increased in recent years to meet the needs of the growing population. The town has a compact retail core.
- The town has an excellent convenience offer, with all of the major multiples with the exception of Superquinn being represented in the town. There is also a good provision of complementary convenience offer including specialist craft butchers, delicatessens, fruit and veg, artisan bakery and fish shop.
- The town has good car parking facilities including a number of surface car parks such as that at Tesco, Dunnes and Supervalu, basement car parking at Dunnes Stores and the High Street and a large multi storey car park in the High Street development. The majority of the parking is free for a two to three hour period.
- The retail offer in the town is complemented and supported by services such as a number of public houses, restaurants and cafes. The Ashbourne House Hotel and the Residents Hotel is also located in the town centre, with the Marriott Hotel located to the north of the town centre.
- Vacancy rates in the traditional town core are notably low.

Weaknesses

- The town centre suffers from congestion, particularly at peak hours. It is noted that Meath County Council is progressing a Part VIII proposal in respect of the former N2 from Rath roundabout through the town which will address this issue.

- Parking on the traditional main street is somewhat ad-hoc and there is poor directional signage to parking areas off the main street.

- There are high levels of vacancy in the High Street development.

- The quality of the public realm and streetscape on the traditional main street~~–~~ (Frederick Street) is generally weak.

- The town lacks multiple representation, particularly in terms of ladies fashion.

- The treatment of public spaces, particularly in the High Street Development and on Frederick Street is generally weak. The town lacks a defined civic space.

Opportunities

- Ashbourne has a large population and attracts people from a wide catchment area. There is scope to enhance and consolidate the towns retail role and function and to improve synergy between the traditional main street and new retail developments to the west.

- There is potential to improve the appearance of the public realm on Frederick Street and to introduce traffic calming, enhanced pedestrian crossing facilities and rationalised parking. Off street parking in particular needs to be better signposted.

- Improved hard and soft landscaping would assist with improving the appearance of the town and making it a more welcoming and desirable shopping destination.

- The opportunity to pedestrianise the High Street d~~D~~evelopment should be investigated in order to enhance the shopping environment in this new development. Pedestrian crossing facilities would also be desirable.

Threats

- Ashbourne is located in close proximity to Dublin City and other significant retail centres such as the Pavillions in Swords. This may make it difficult to attract multiples to the town, particularly comparison multiples.

- Traffic congestion and poor quality public realm do not contribute to the character and appearance of the town or to its attraction as a shopping destination. As noted above, this is being addressed by the County Council by way of a Part VIII proposal.

Definition of Core Retail Area

5.7.5 Ashbourne has a relatively compact town centre with the main shopping areas centered around the traditional town core of Frederick Street, extending to the north to include the Ashbourne Town Centre development anchored by Supervalu and the large Dunnes Stores which occupies the former Dardis & Dunns seed merchant site. The core retail area also extends to the west to include the new High Street development and Tesco store and to the south to include the Aldi store.

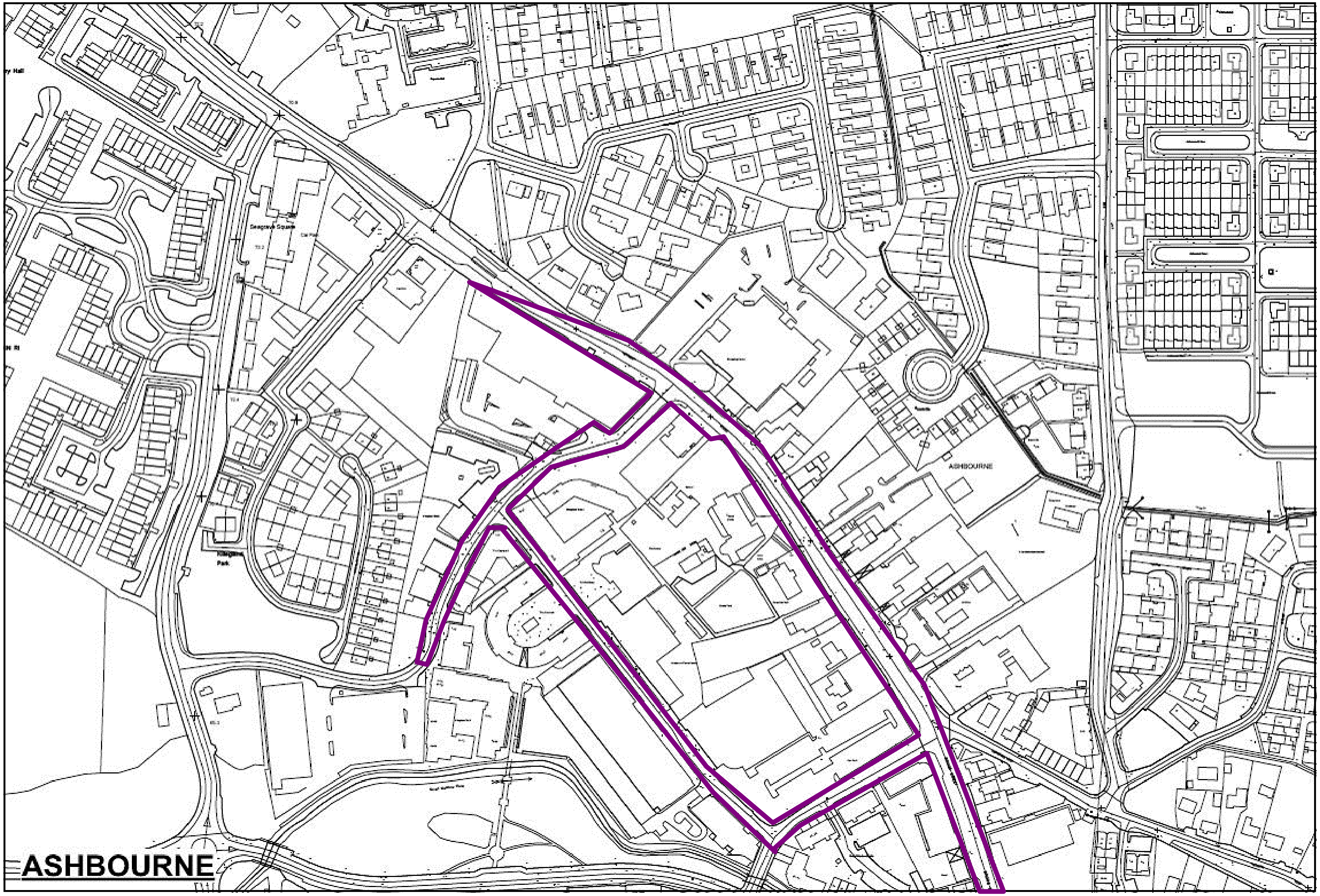


Figure 5.37: Ashbourne Core Retail Frontage

Attractions

5.7.6 Ashbourne has a number of attractions. In retail terms, it is the second largest retail centre in the county and accommodates a good range of convenience and comparison retail offer as well as associated services and facilities. Other attractions include the Tayto Theme Park at Kilbrew.

5.7.7 Convenience representation in the town is particularly strong with a Dunnes Stores, Tesco, Aldi, Lidl, Iceland, Supervalu, Polish Supermarket and Independent Supermarket (Murtaghs). A Buy Lo is located in the Ashbourne retail park to the north of the town There are also a number of complementary convenience outlets including artisan bakery, fruit and veg shop, fish shop and craft butchers.

5.7.8 Retail development in the town was traditionally focused on Frederick Street. Today this accommodates a wide variety of service, financial, civic and retail functions. The core has a traditional streetscape of narrow building plots and buildings of two to three storeys~~ies~~. There are a number of public houses, financial institutions, a Garda Station, service outlets and an independent convenience operator. There are also some small independent comparison outlets. The Catholic Church is also located in the traditional town core. Vacancy within the traditional town core is low. The Ashbourne Town Centre development is also located to the north of the main street. This is anchored by Supervalu and accommodates a variety of other smaller retail outlets primarily with a service function. Vacancy within the shopping centre is low with 2 vacant units noted. A large Dunnes Stores has been developed opposite the Town Centre development.

5.7.9 Up until recent years, commercial development in the town was hampered by the fact that the town was bisected by the busy N2 route. However, since the bypass of the town there has been a notable expansion of the town centre westwards into Killegland.

5.7.10 This area now accommodates the High Street development which is effectively a new retail street running parallel with the traditional main street. To the south of the street there is a large Tesco store with surface car parking. The High Street development comprises a long linear vehicular street accommodating a number of retail units with apartment development overhead. There is a good mix of retail representation in the development including a number of service providers (e.g. computer repairs, pharmacy, xtravision, Meteor), boutiques, cafes and restaurants. There are a number of multiples represented in the development including Lifestyle, New Look, Easons, Iceland, O' Briens, Holland and Barret, Premaman, Boots etc. The town's public library is also accommodated within this development.

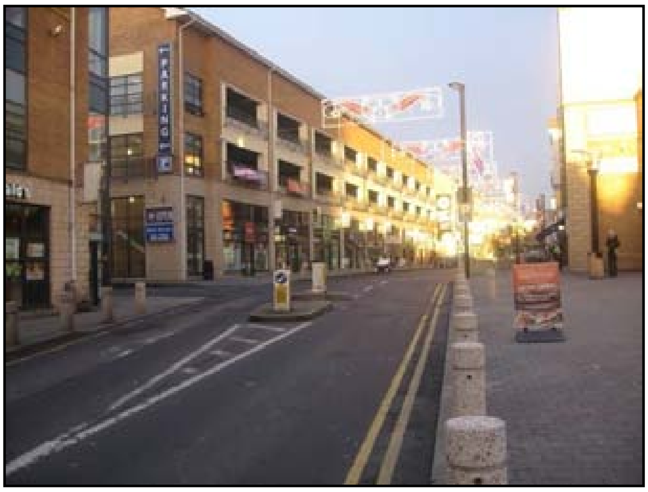


Photo 5.51: High Street Development

Photo 5.52: Library

Photo 5.53: Tesco

Photo 5.54: High Street Square

5.7.11 The main retail street terminates with another new retail street (Declan Street) which provides a link to Dunnes stores to the east and Lidl to the west. Declan Street comprises a number of vacant units (approximately 19 in total) and has been unsuccessful to date as a viable retail and commercial location.

Photo 5.55 and 5.56: Vacant Units

5.7.12 The High Street development has significantly improved car parking provision in the town as a result of both a large underground car park beneath Killegland Street (extending from Tesco to the Civic Offices) and a multi-storey car park with over 579 spaces above the retail units on the south end of the street. Parking is free within the development.

5.7.13 To the north of the town centre in Rath, there is a retail park of approximately 14,000 sq. metres with over 1,000 car parking spaces. The Ashbourne Retail Park comprises retail warehouse development and accommodates an Argos, Buy Lo, Des Kelly Carpets, Tile Once, Expert and Equipet. There are a number of vacant units in the retail warehouse park, despite the recent introduction of Showtime Cinemas and Fun Galaxy. The anchor unit, previously occupied by 4Home Superstores, is also vacant.

5.7.14 Other attractions in the town include the Ashbourne Golf Club and Donaghmore-Ashbourne GAA club, Ashbourne Rugby Club, Ashbourne United Football Club and Athletics Club. There is also a large Marriott Hotel located to the north of the town centre. Fairyhouse Racecourse is located 10km from the town.

Accessibility

5.7.15 Ashbourne is easily accessible by the national road network being located just off the M2 Bypass. Travel ti~~o~~me from Dublin City is approximately 45 minutes.

5.7.16 The town is also accessible by bus. Ashbourne is served by Bus Éireann who provide a regular service (Route 103) from Dublin, every 30 minutes at peak times to the town. Some of these services continue on to Ratoath, Kilmoon Cross and Duleek. At the beginning of March 2010, a regular service to and from Navan via Dunshaughlin and Ratoath to Dublin Airport that had previously not passed through Ashbourne was rerouted to serve the Marriott Hotel at the northern end of the town, and to then go through the town to the airport and Dublin City University. The service (route 109A) runs every hour from early morning to late evening.

5.7.17 The 105 service from Ratoath also serves Ashbourne. Route 177, with a low frequency, serves Ashbourne from Dublin, and goes on to Slane, Ardee and Monaghan, with extensions to Clones. There is also a very limited service (Route 107) from Kingscourt to Dublin via Ashbourne.

5.7.18 Within Ashbourne, the town generally suffers from traffic congestion. This is exacerbated by ad hoc on street car parking arrangements and poor directional signage to off street car parking, particularly the surface car parking areas located to the rear of the Bank of Ireland and Murtaghs Convenience Store. It is noted that Meath County Council is progressing a Part VIII proposal in respect of the former N2 from Rath roundabout through the town which will address this issue.

5.7.19 There is scope to significantly improve the pedestrian environment of the traditional town core through the provision of high quality hard and soft landscaping, traffic calming measures, rationalised car parking and improved pedestrian crossing facilities.

5.7.20 The new High Street development located to the west of the traditional town centre is also somewhat dominated by vehicular traffic. The development is however served by generous footpaths and a good quality public realm. Nonetheless there is a notable lack of pedestrian crossings.

5.7.21 Pedestrian movement on Frederick Street could be enhanced. Connection and synergy between the Ashbourne Town Centre, Dunnes Stores and New High Street development could be improved and enhanced.

5.7.22 The volumes of traffic, lack of pedestrianised streets and poor public realm in the traditional town core detracts from the attractiveness and permeability of the town centre.

5.7.23 Parking provision in the town is good and generally free for a 2 to 3 hour period. There are large surface car parks serving all of the convenience operators in the town including Supervalu, Dunnes, Tesco, Lidl and Aldi. In addition there is on street car parking along Frederick Street and at the High Street scheme. There is also a multi storey car park with over 500 spaces in the High Street and basement parking is provided at the High Street and Dunnes Stores.

5.7.24 Surface car parking is also provided off Frederick Street, although is of variable quality.

Photo 5.57: Surface Car Parking off Frederick Street

Environmental Quality / Amenity

5.7.25 Ashbourne has an active and traditional town centre area, with significant contemporary additions. Vacancy levels are low and the main street – Frederick Street has a traditional character with narrow plots and low rise buildings.

5.7.26 The town centre is well maintained in terms of litter management. However, the quality of the public realm is relatively weak. Street furniture is limited and there is a general absence of soft landscaping, public art, public seating etc. Shop front design could be improved in the traditional town centre area and cluttered signage removed to enhance the overall character of the streetscape.

5.7.27 There are a number of surface car parking areas located off the main street. These are an advantage for the town in terms of accessibility, but are poorly signposted. Some of this surface parking provision is of poor standard and requires resurfacing. On street parking is somewhat ad-hoc and is exacerbated by the lack of clear parking bay demarcation and loading bay provision. Traffic congestion and speed in the town centre is a particular problem and there is scope to improve traffic calming.

Photo 5.58: Public Realm, Frederick Street in need of upgrade

Photo 5.59: Public Realm, Frederick Street

5.7.28 The High Street Development has a higher quality public realm. Again however, the area lacks a clear focal point and there is a general absence of soft landscaping and planting. The development has significant vacancy as one moves away from the prime retail pitch and this vacant street provides for poor synergy between the development and the traditional town core at its northern end.

Diversity of Uses

5.7.29 Ashbourne provides a wide range of lower/middle order comparison goods and an excellent range of convenience provision. As a third level town within the retail hierarchy there is also a good range of other town centre functions and activities including retail services, public houses, restaurants and cafes. Generally speaking the town has a lack of higher order comparison retail, particularly in terms of ladies fashion and little multiple representation in this regard. This is likely to be due to the proximity of the town to Dublin City, Blanchardstown and the Pavillions.

5.7.30 The town has an active town centre.~~,~~ H~~h~~owever, vacancy rates are high particularly in the High Street development. The vacant street detracts from this development and provides for poor connectivity between the development and Dunnes Stores and Frederick Street. There are also a number of other derelict sites in the town centre area including key sites on Bridge Street and Bachelors Walk that are in need of regeneration.

Multiple Representation

5.7.31 Ashbourne has quite a lot of national multiple representation, particularly in the High Street development. However, t~~T~~his representation tends to be~~ however,~~ in complementary facilities such as fast food and service providers and the only comparison multiples of note are Lifestyle, Premaman and New Look. There is a lack of international multiple representation. Given the role of the town in the retail hierarchy and its proximity to other larger competing centres, it will be difficult to attract retailers of this nature to the town centre.

5.7.32 In terms of conveniences provision, all of the major multiples including Tesco, Dunnes, Aldi, Lidl, Supervalu, Iceland and Polonia are represented. In addition there is a Buy Lo in the Ashbourne Retail Park.

Rates of Vacancy

5.7.33 The vacancy rate in the traditional town core area of Ashbourne is low. Within the Ashbourne Town Centre scheme anchored by Supervalu there are two vacant units. Only one small vacant unit in the town core was noted. There were two small vacant units in the Town Centre development. The majority of vacancy is located in the High Street Development with approximately 19 units. However it is noted that there are applications for change of use of a number of these units to accommodate a creche and medical centre.

5.7.34 There are also a number of derelict sites of note within the town centre including those adjacent to Aldi on Bridge Street and the site adjacent to the existing parade of retail units on Bachelors Walk. There is also a large vacant/derelict site at the junction of Castle Street and Broadmeadow Castle.

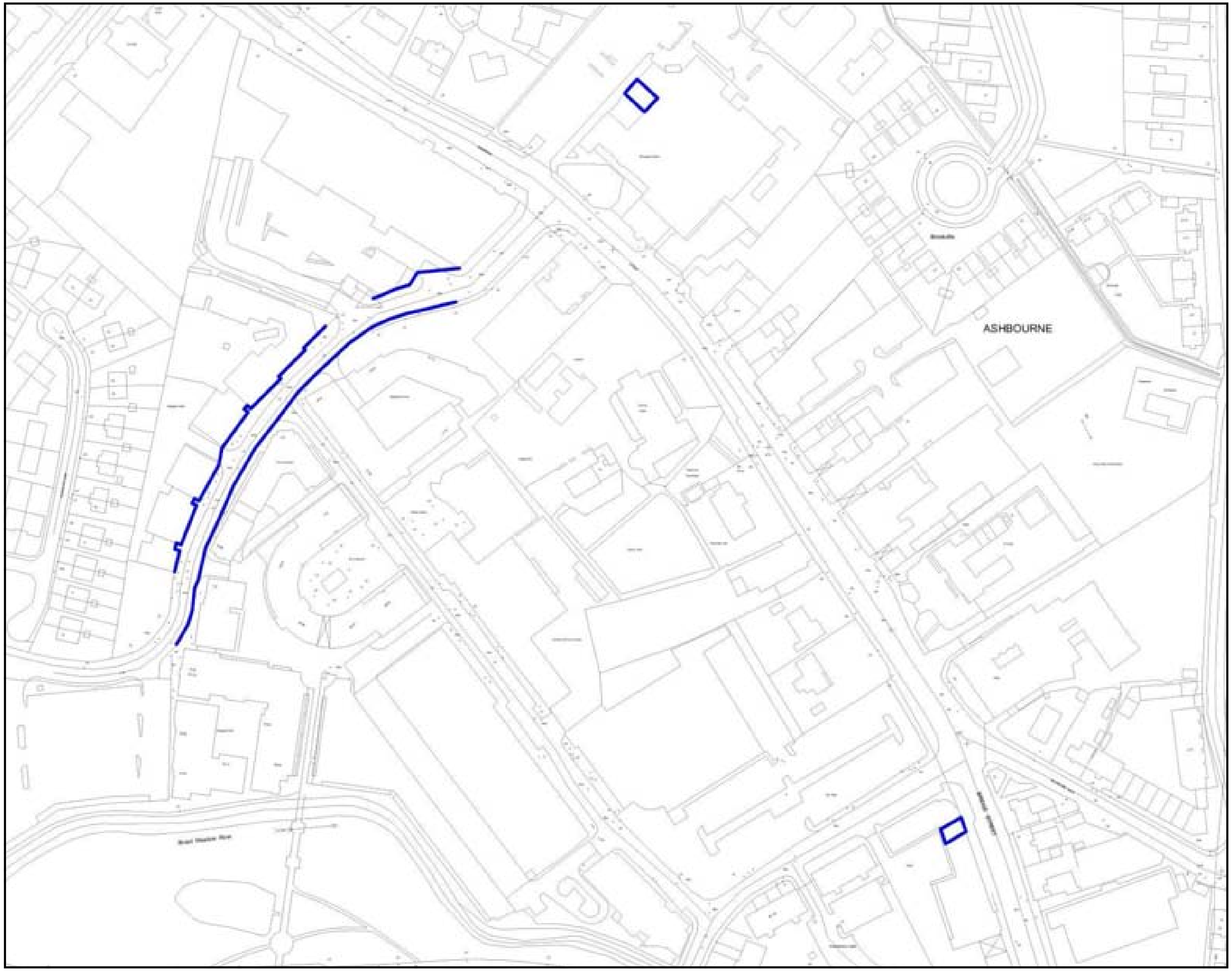


Figure 5.38: Vacancies in Ashbourne

Significant Changes to the Retail Environment Since 2003

5.7.35 At the time of the preparation of the last Retail Strategy, it was noted that there was a lack of retail provision in the town. Significant retail development was in the pipeline and it was detailed that extant permissions if implemented would increase the town's retail floorspace from 3,056 sq. metres to 9,487 sq. metres. The potential of the Dardis and Dunn site was also noted.

5.7.36 Since then, significant retail development has been implemented. The most significant scheme has been the High Street development which accommodates a wide variety of new retail and service outlets grouped along a new vehicular street. The Dardis and Dunne site has been developed as a large convenience and comparison Dunnes Stores. Other notable developments in the town have been the Lidl and Aldi stores and the Ashbourne Retail Park to the north of the town centre which accommodates over 14,000 sq. metres of retail floorspace.

Retail Opportunity Sites

5.7.37 There are a number of opportunity sites in Ashbourne. This includes the three vacant/derelict sites noted above at Bridge Street, Bachelors Walk and Castle Street, as well as other potential sites located on Frederick Street, site adjacent to Dunnes Stores and a backland site to the rear of the Garda Station. These sites could be investigated for the provision for new retail development should the need arise. The location of these sites are outlined overleaf and they are described subsequently..

5.7.38 There is also extensive vacancy within the Declan Street Development and the use of these units should be strongly encouraged.

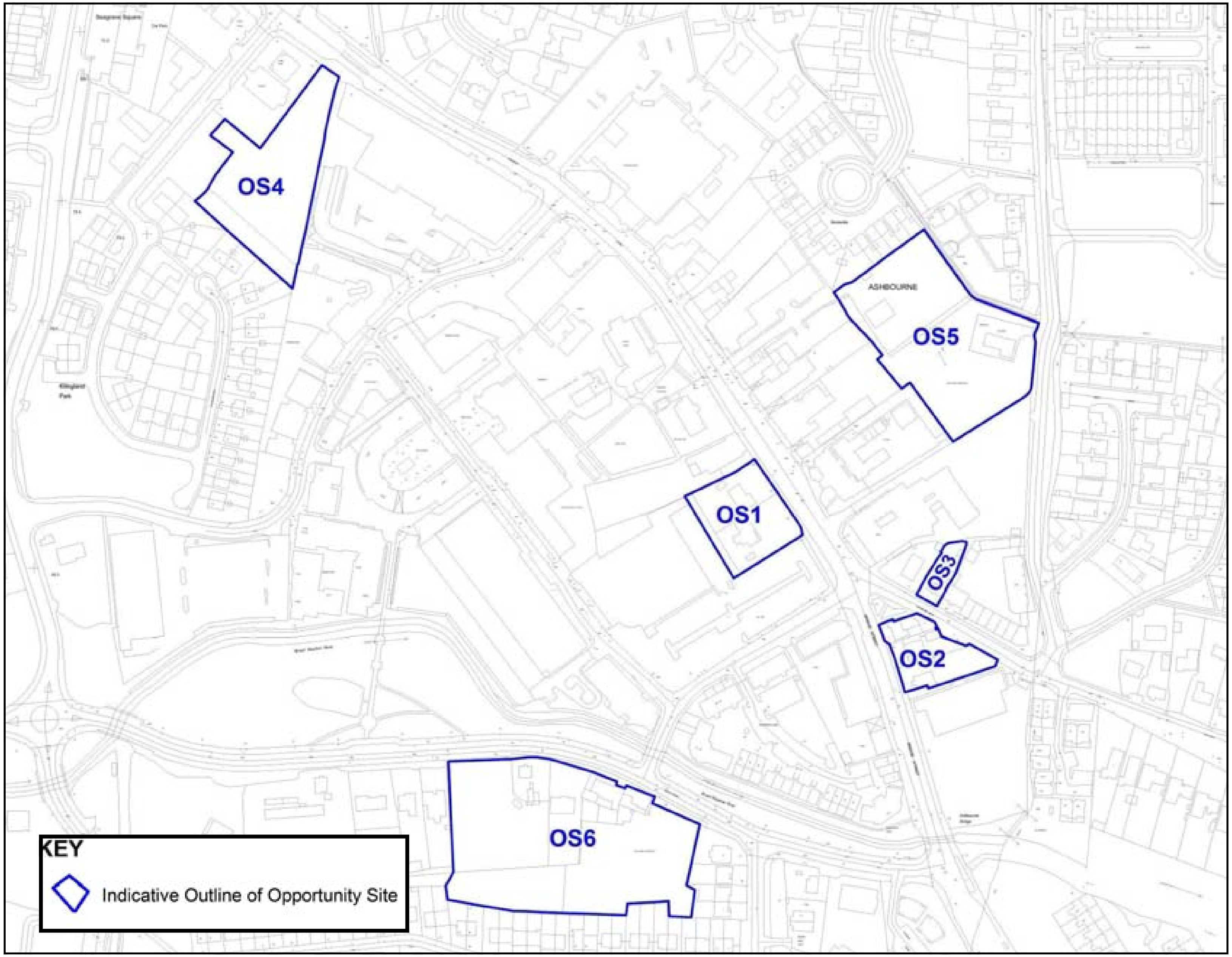


Figure 5.39: Opportunity Sites in Ashbourne

OS1: 2 dwelling houses located adjacent to Tesco Car Park, Frederick Street. This site comprises two private dwelling houses, located on the main street. The dwellings are detached and are surrounded by extensive gardens. The properties back onto the existing Tesco development and immediately to the north of the car park. There is potential to amalgamate the properties to create a new ~~town centre~~ development in the town centre. As the properties are private dwellings, it is acknowledged~~,~~ that their acquisition may be difficult.

Photo 5.60 and 5.61: 2 dwelling Houses – Frederick Street

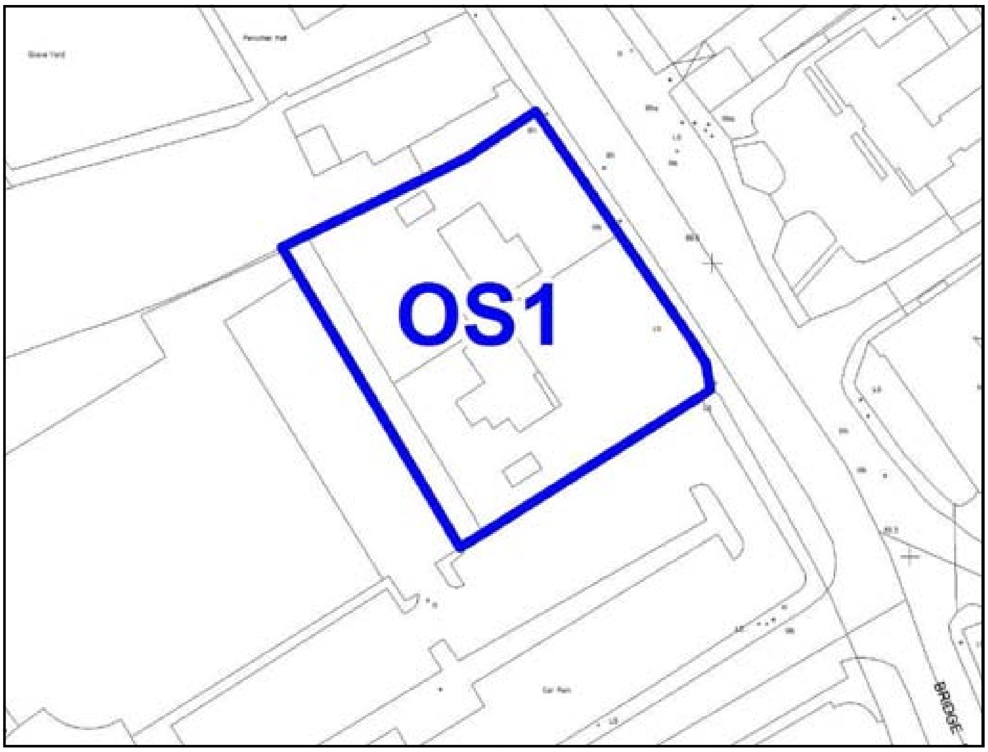


Figure 5.40: OS1 Ashbourne

OS2: This site is located immediately adjacent to the Aldi store on Bridge Street. The site is currently surrounded by hoarding and accommodates a number of derelict dwellings. The site has an extant permission (DA 70640) for a mixed use scheme comprising apartments, office development and retail. A total of 11 retail units were proposed. There may be scope to develop a retail commercial scheme on the subject site.

Photo 5.62: Opportunity Site Adjacent to Aldi

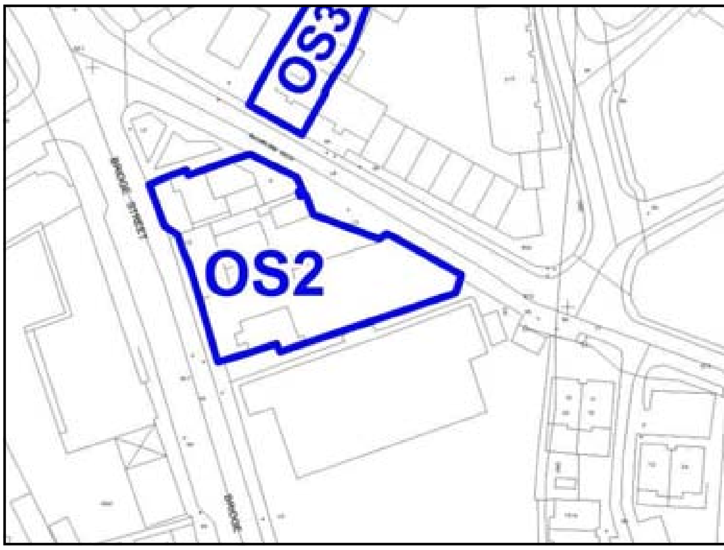


Figure 5.41: OS2 Ashbourne

OS3: This site is located on Bachelors Walk. The development of this site would complement the parade of other commercial properties that have been developed on the immediately adjacent lands.

Photo 5.63 and 5.64: Site at Bachelors Walk

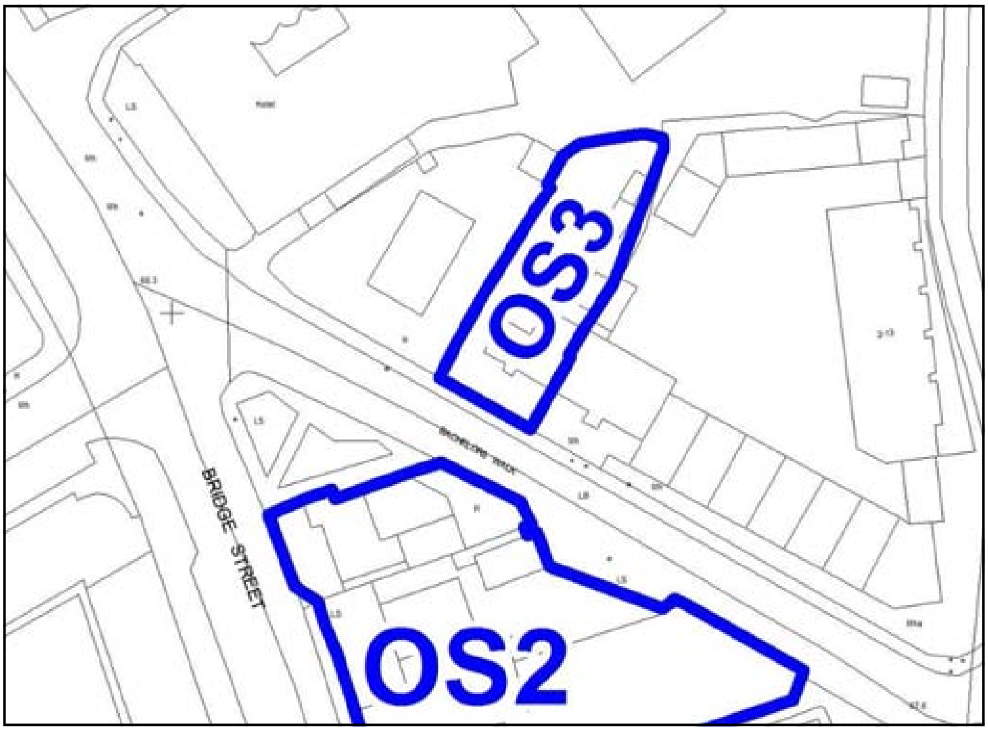


Figure 5.42: OS3 Ashbourne

OS4: This is a large greenfield site located to the north of the main street immediately adjacent to Dunnes Stores and Ashbourne Credit Union. The site is also connected to the existing car parking located to the rear of the Dunnes Stores.

Photo 5.65: Greenfield Site Adjacent to Dunnes

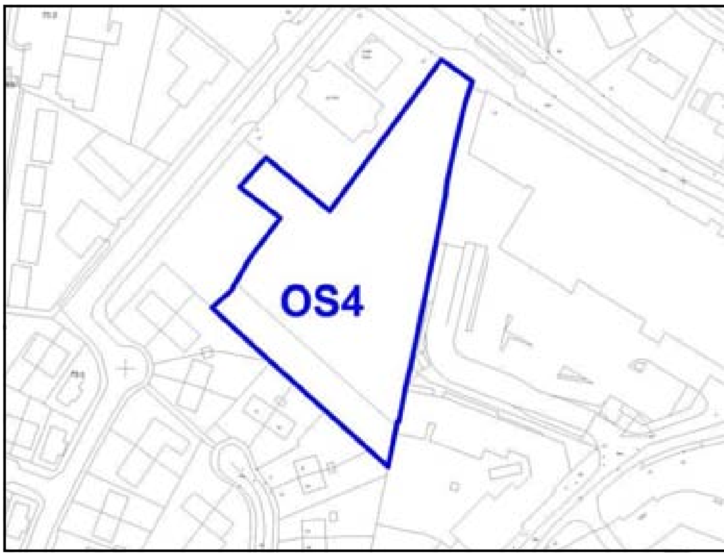


Figure 5.43: OS4 Ashbourne

OS5: This site is a backland site located to the rear of the Garda station and Ryan Funeral Home. It is predominantly a greenfield site, although part of it accommodates an Eircom depot and telephone exchange. There is an extant permission for residential development on the site. The development of this site would require the development of a strong connection with Frederick Street in order to provide an appropriate level of synergy with the traditional town core. This may require the acquisition of a property on the main street to facilitate such an appropriate connection.

Photo 5.66: Site to rear of Garda Station

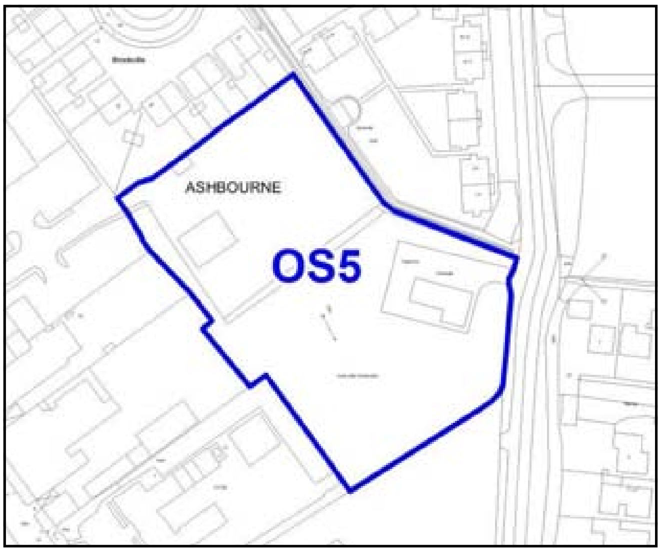


Figure 5.44: OS5 Ashbourne

OS6: This site is located on Castle Street. The site is currently partially surrounded by hoarding and it accommodates some derelict dwellings and buildings. This site would be considered an edge of centre site, but may be appropriate for a retail format that is not suitable or too large for a town centre core site.

Photo 5.67 and 5.68: Site at Castle Street

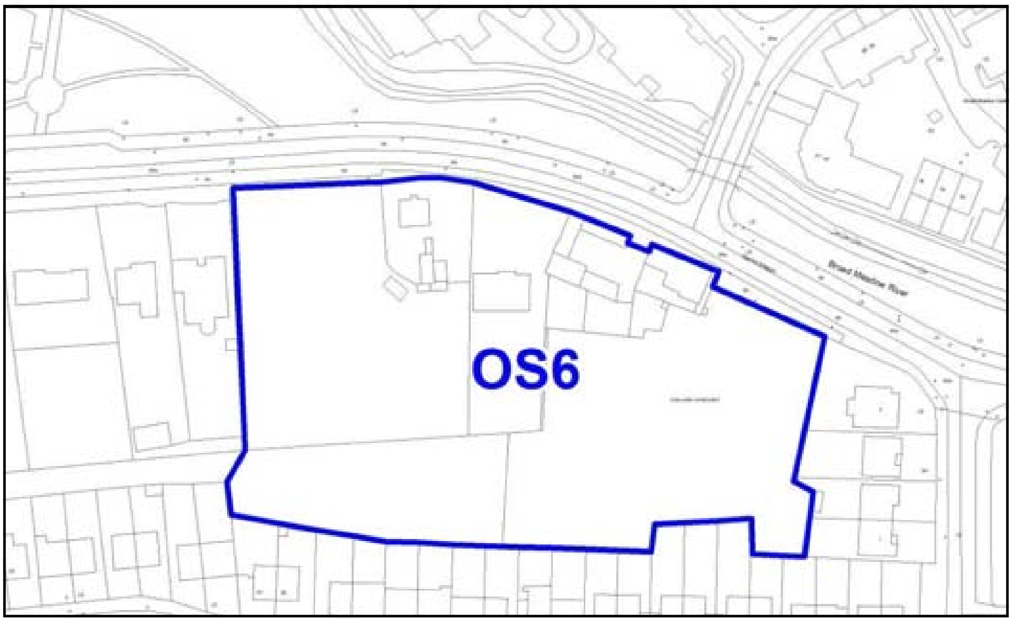


Figure 5.45: OS6 Ashbourne

Key Actions and Recommendations

5.7.39 The key actions and recommendations arising from this health check are as follows:

(i) Car parking spaces to be clearly demarcated on Frederick Street and loading bays to be clearly identified. Appropriate parking directional signage to be erected highlighting location of off street parking provision. Erection of car parking information signs on the approach to the town centre should be investigated.

(ii) Investigate opportunities for greater pedestrianisation both in the town centre and in the High Street development.

(iii) Identify measures to improve pedestrian crossing facilities within the High Street scheme.

(iv) Promote the improvement of the public realm, including hard and soft landscaping, improved paving, litter bins, street furniture and lighting.

(v) The vacant retail street within the High Street Scheme is a significant problem and promotes poor synergy between this development and the traditional town core. In this regard, innovative measures to promote the use and regeneration of these units should be investigated and promoted.

(vi) Promote the development of key opportunity sites in the town centre and in particular the existing derelict sites at Bridge Street and Bachelors Walk.

5.9 Conclusions

5.9.1 Ashbourne has experienced significant growth in recent years. Consequently, retail development has also significant increased and the town is now the second largest retail centre in the County.

5.9.2 The success of these new retail schemes have been mixed and there is significant vacancy both within the High Street development and the Ashbourne Retail Park. Nonetheless, the retail offer of the town has significantly improved, particularly in terms of convenience offer.

5.9.3 The traditional town centre area seems to have fared well and is located in close proximity to the retail developments that have emerged to the west of the town centre. Nonetheless the physical environment of the town centre needs improvement and there is scope for improvements, particularly in terms of the public realm, improved on street parking arrangements and enhanced signage.

5.9.4 There are further opportunities to develop and consolidate retail development within the town core through the development of key opportunity sites.

5.8 DUNSHAUGHLIN

Introduction

5.8.1 Dunshaughlin is situated off the M3 motorway and the R125 regional route which links to Kilcock / M4 Motorway to the south west and Swords via Ratoath and Ashbourne to the east. Dunshaughlin is located approximately 27 kilometres from Dublin and 19 kilometres from Navan.

5.8.2 The Retail Planning Strategy for the Greater Dublin Area identifies Dunshaughlin, along with the likes of Dunboyne, Ashbourne, Kells, Trim, Laytown/Bettystown and Enfield as a Level 3 centre, which are town and/or district centres and sub-county town centres.

5.8.3 The Meath County Development Plan 2007 – 2013 identifies Dunshaughlin as a Moderate Sustainable Growth Town, along with towns such as Ashbourne, Kells, Trim and Kilcock. The Regional Planning Guidelines for the GDA states that *"Dunshaughlin will become a Moderate Sustainable Growth Town following the granting of permission of a railway order for the Navan Rail Line Phase II, including a station at Dunshaughlin".*

5.8.4 The 2011 preliminary population results indicate that Dunshaughlin (including environs) has a population of 3,903~~5,674~~, and increase from 3,384~~5,245~~ in 2006.

5.8.5 The former N3 (R147) forms the main street of the town and is the location for much of its retail and other services. Dunshaughlin has traditionally been a service centre for this area of County Meath and continues to function as a centre for retailing, education, health services, and light industrial functions.

SWOT Analysis

Strengths

- The M3 motorway has greatly improved the urban environment along Main Street and has reduced traffic congestion. However, a level of congestion still remains in the town centre, due in particular to the poor access arrangements to and from the Supervalu store in the town centre.
- There is a strong retail focus in the town centre of Dunshaughlin, with the Main Street lined with independent retailers that add variety and interest to the town.
- There is one convenience store – Supervalu, located to the west of the Main Street and this is the only large convenience retail operator in the town.
- The town centre has remained the focus of retailing and is considered to be relatively vibrant with a good level of footfall.
- ~~The presence of the rail line and rail station to the east of the town has improved accessible. The relatively large expanses of undeveloped land surrounding the rail station could also be seen as a strength.~~

Photo 5.69 and 5.70: Site at Castle Street

Weaknesses

- Dunshaughlin lacks any notable national or international competitors, with the exception of Super Valu.
- Whilst the town centre itself is vibrant, peripheral areas, particularly to the northern end of Main Street, have a dilipdated appearance and detract from the overall appearance of the town.
- In addition, despite the opening of the M3, traffic flow in the town centre continues to be problematic, particularly around the junction between Main Street and Super Valu.

Photo 5.71: Super Valu, Dunshaughlin

Photo 5.72: Poor traffic arrangements between Main Street and Super Valu

- The Dunshaughlin Town Centre development, located to the east of Main Street, contains a number of vacant retail units at ground floor level. This indicates that there is little demand for retail floorspace in Dunshaughlin at present.

Photo 5.73: Town Centre Expansion Area, North of Dunshaughlin Main Street

Opportunities

- There are considered to be good opportunities for backland development in strategic locations in the town centre which will allow the town to consolidate its position in the retail hierarchy and address the weaknesses in the retail offer of the town centre.

Threats

- Dunshaughlin's location on a national road network, and in relative close proximity to competing centres such as Blanchardstown Town Centre, Navan and Ashbourne, means that there is considerable competition for the spending power of its core catchment population. There is a need to ensure that there is a sufficient quantum and range of retail facilities to cater for the existing and future population of the town and its surrounding hinterland.

- Care should be taken to ensure that new retail development is directed to town centre locations where possible. The delivery of neighbourhood centres of an appropriate scale and at appropriate locations can assist with serving the needs of the expanding local community.

Definition of Core Retail Area

5.8.6 The town has developed primarily in a linear fashion and t~~T~~he core retail area comprises ~~includes much~~ of Main Street, ~~at its eastern side from Supple Hall to opposite the Bank of Ireland, to include~~ incorporating the Super Valu store~~, and on its east side from just north of the Bank of Ireland to the north as far south as~~ and the Dunshaughlin Town Centre development.

~~, extending to the east to include ground floor retail units in the town centre development.~~

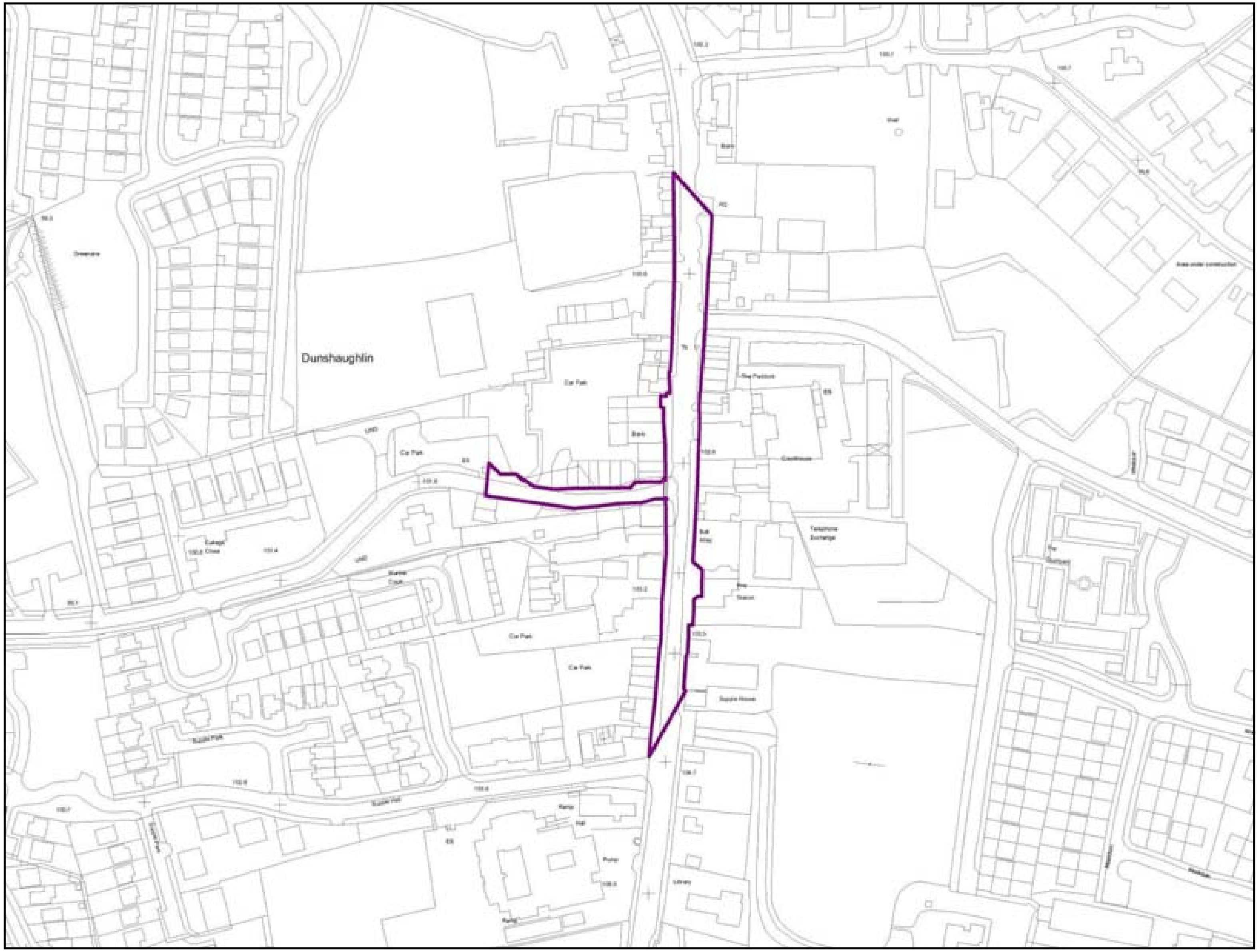


Figure 5.46: Dunshaughlin Core Retail Frontage

Attractions

~~5.8.6~~5.8.7 Dunshaughlin has a significant heritage appeal and has sought to take advantage of this through the provision of a Heritage Trail, which opened in 2011. The heritage trail is a tour of 17 sites and locations of historical significance, each marked with a plaque giving a brief history. It includes such sites as a Norman motte, a crannóg, a workhouse, and the local Church of Ireland which has stone carvings dating back to the 6th or 7th century.

~~5.8.7~~5.8.8 In retail terms, Dunshaughlin has a relatively good range of retail services and as such acts as an attraction to the surrounding hinterland in retail terms. There is a good range of independent retailers in the town, ranging from gifts to fashion, which makes the town an attractive destination.

Photo 5.74: Dunshaughlin Heritage Trail Sign

Accessibility

~~5.8.8~~5.8.9 Dunshaughlin has good accessibility by both road and public transport. Being located on the M3 –route at its intersection with the R125 regional route, Dunshaughlin is located approximately 27 kilometres from Dublin and 19 kilometres from Navan. Dunshaughlin is also well connected to Dunboyne to the south via the M3 and to Ashbourne and Ratoath to the east, by way of the R125 regional road.

~~5.8.9~~5.8.10 Parking is available on-street, and is supplemented by additional off-street car parking facilities, for example at Super Valu. There is no pay and display or minimum stay system in operation.

~~5.8.10~~5.8.11 Public transport services are currently provided by bus. The 109 service between Dublin and Cavan would be the principal service for Dunshaughlin, operating at 15 minute intervals at peak and half hour service outside peak. .Bus Eireann service 109A operates between Dublin Airport and Kells, serving Dunshaughlin and also Ashbourne, Ratoath and Navan. Travel time to the airport is appropriately 60 minutes, and travel time to Navan is approximately 20 minutes. Services operate approximately every hour. There is currently no main line rail access to Dunshaughlin.

Environmental Quality / Amenity

~~5.8.11~~5.8.12 The physical appearance and built environment of the town centre is considered relatively attractive, particularly in the town centre core where the majority of the buildings retain a traditional appearance and shopfronts are well maintained.

~~5.8.12~~5.8.13 Footpaths are generally of a good quality and pedestrian crossing facilities are provided. The footpaths are wide and well surfaced with some of them finished in attractive paving. The Main Street also includes good quality street furniture with benches, rubbish bins, flower pots, and directional signage all clearly visible.

~~5.8.13~~5.8.14 As noted previously, traffic flow in the town centre remains a problem.

Diversity of Uses and Multiple Representation

~~5.8.14~~5.8.15 Dunshaughlin has a limited range of retail facilities. In terms of convenience provision, the main outlet is Super Valu and this is supported by a number of newsagents, and a fruit and veg outlet. There is a lack of diversity in the convenience retail offer.

~~5.8.15~~5.8.16 In terms of comparison provision, whilst there are no national or international multiples, there is a relatively good range of independent stores, for example there are a number of ladies fashion boutiques, a ladies footwear outlet, a jewellers, a carpet outlet, a homeware store, and an arts and gifts store.

~~5.8.16~~5.8.17 It is considered however that the town could provide a greater range of comparison retail provision.

~~5.8.17~~5.8.18 There are a number of public houses, restaurants, take-aways and cafes present in the town. Notwithstanding this, it is considered that there could be a demand for high-quality café / bistro uses in the town centre. Such uses would potentially attract and retain visitors in the town centre.

~~5.8.18~~5.8.19 Services provision is ~~also~~ relatively good, with services such as an auto parts outlet, estate agents, a veterinary clinic, an euro-mart, hardware stores, a number of pharmacies, bookmakers, a beauty salon, a video rental store, a solicitors, laundrette, an optician, a number of banks, a number of barbers, and a post office.

Rates of Vacancy

~~5.8.19~~5.8.20 There are a number of vacant units within the defined core retail area of Dunshaughlin. There are 6 no. vacancies recorded in the Dunshaughlin Town Centre scheme, and a further 6 no. vacancies located along the western side of Main Street. This represents a vacancy rate of 21.8%. There is one further vacancy recorded outside the core area, to the northern end of Main Street.

~~5.8.20~~5.8.21 The locations of the vacant units are depicted on the figure overleaf.

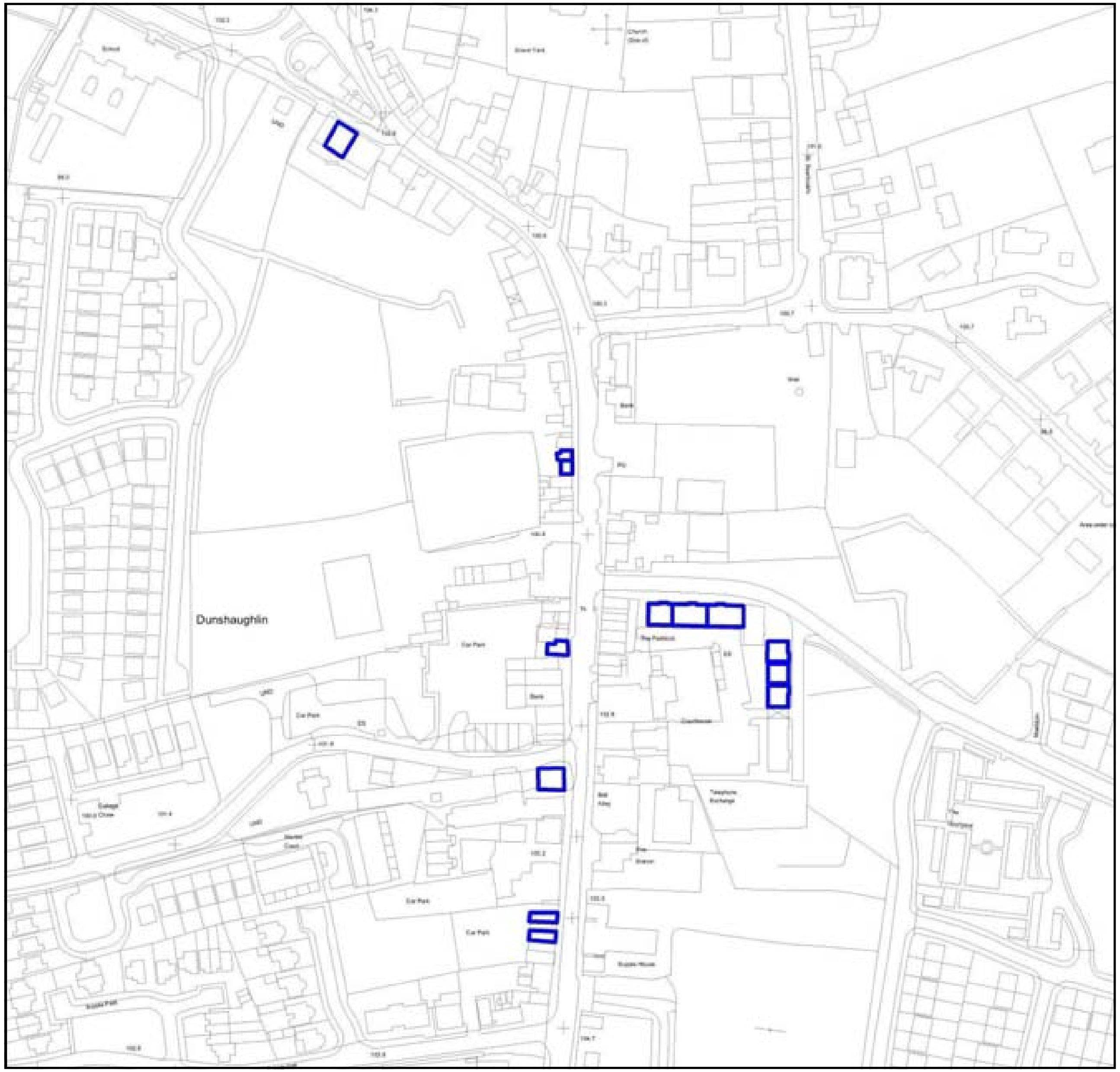


Figure 5.47: Vacancies in Dunshaughlin

Significant Changes to the retail Environment Since 2003

~~5.8.21~~5.8.22 The Retail Planning Strategy for the Greater Dublin Area (2008) indicates that 784 sq. m. of net convenience floorspace and 1,454 sq. m. of net comparison floorspace in Dunshaughlin. It is also estimated that there is 600 sq. m. of bulky household floorspace.

~~5.8.22~~5.8.23 There is no evidence of any significant retail developments in the town since 2003. There is a current application under Reg. Ref: DA11/0174 for development on lands to the west of Main Street. This development comprises a single storey anchor retail unit with a gross floor area of circa 4,439 sq. m. (selling convenience & comparison products) & a net sales area of circa 2,726 sq. m. and 5 no. retail units with a total gross floor area of circa 555 sq. m. Planning permission has been granted by Meath County Council and the development is currently on appeal at An Bord Pleanala.

Retail Opportunity Sites

~~5.8.23~~5.8.24 Whilst the town centre area is relatively compact, there are some backland development areas, particularly to the north of the town centre, which would represent appropriate locations for additional retail or mixed use development. These locations will be promoted by the Planning Authority though alternative locations will be considered on their merits.

~~5.8.24~~5.8.25 These sites are shown on the figure overleaf and are discussed below.

OS1: This is a significant backland development site located to the west of the northern end of Main Street and currently comprises primarily of agricultural lands. This site is zoned in the existing Dunshaughlin Local Area Plan 2009 for B1 use, with an objective to *"protect and enhance the special physical and social character of the existing town and village centres and to provide for new and improved town centre facilities and uses".* There is a detailed planning history to this site but no extant permission for development. An application under Reg. Ref: DA11/0174 (see above) for a major mixed use town centre development is currently being considered by An Bord Pleanala, having been granted by Meath County Council. This site represents a key development site in Dunshaughlin and should be prioritised for development.

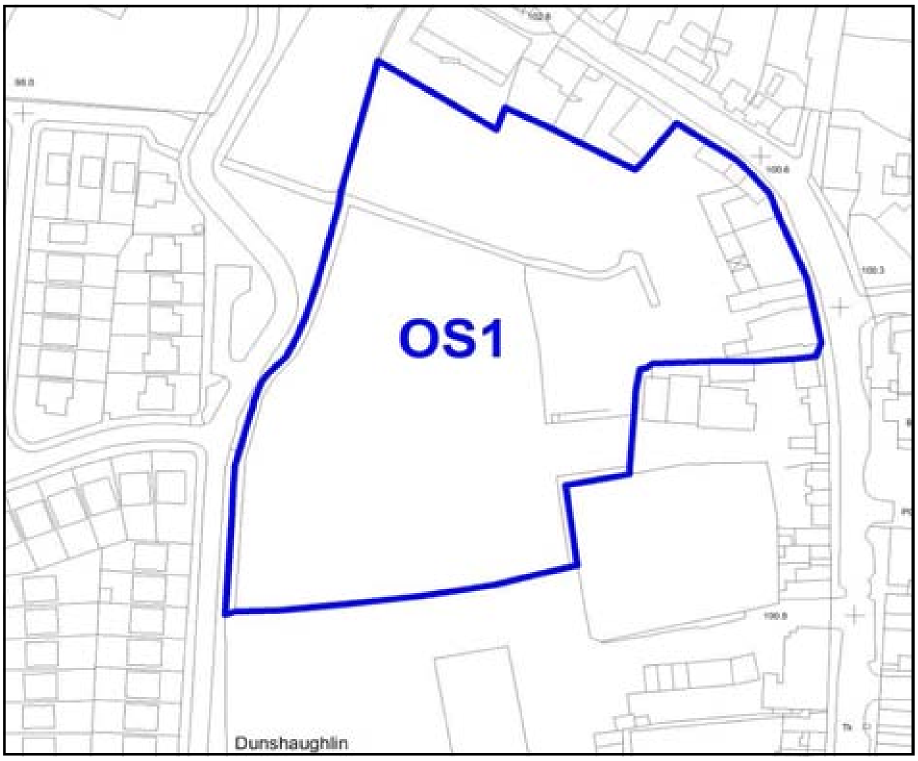


Figure 5.48 OS1 Dunshaughlin

OS2: Located to the east of the northern end of Main Street, this site is located to the rear of the Bank of Ireland, a protected structure, and comprises a sizeable greenfield site which does not currently appear to be in use. This site is zoned in the existing Dunshaughlin Local Area Plan 2009 for B1 use, with an objective to *"protect and enhance the special physical and social character of the existing town and village centres and to provide for new and improved town centre facilities and uses".* This site, although smaller than the adjacent OS1, would also be suitable for mixed use development, or alternatively retail development only.

Photos 5.76 and 5.77: Opportunity Site 2, located to the east of Main Street Dunshaughlin

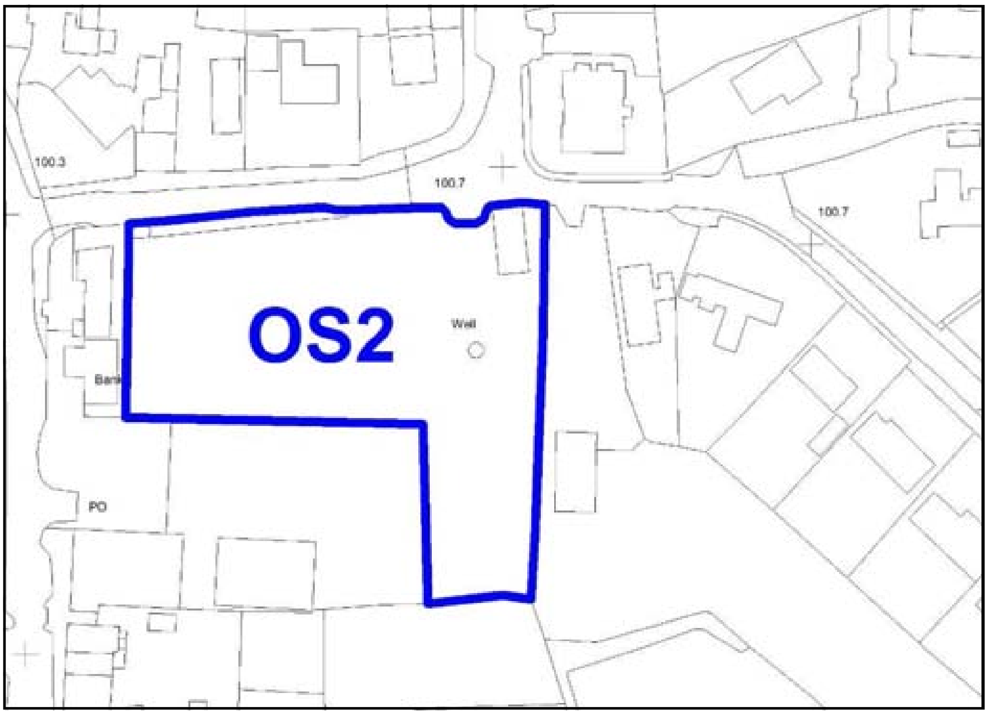


Figure 5.49 OS2 Dunshaughlin

~~5.8.25~~5.8.26 It is noted that planning permission for a neighbourhood centre development at Readsland to the west of Dunshaughlin town centre was refused by An Bord Pleanala (Ref: PL17.236886) in December 2010 for reasons generally relating to the excessive scale of the proposal. The delivery of a neighbourhood centre of an appropriate scale at this location would assist with serving the needs of the expanding local community.

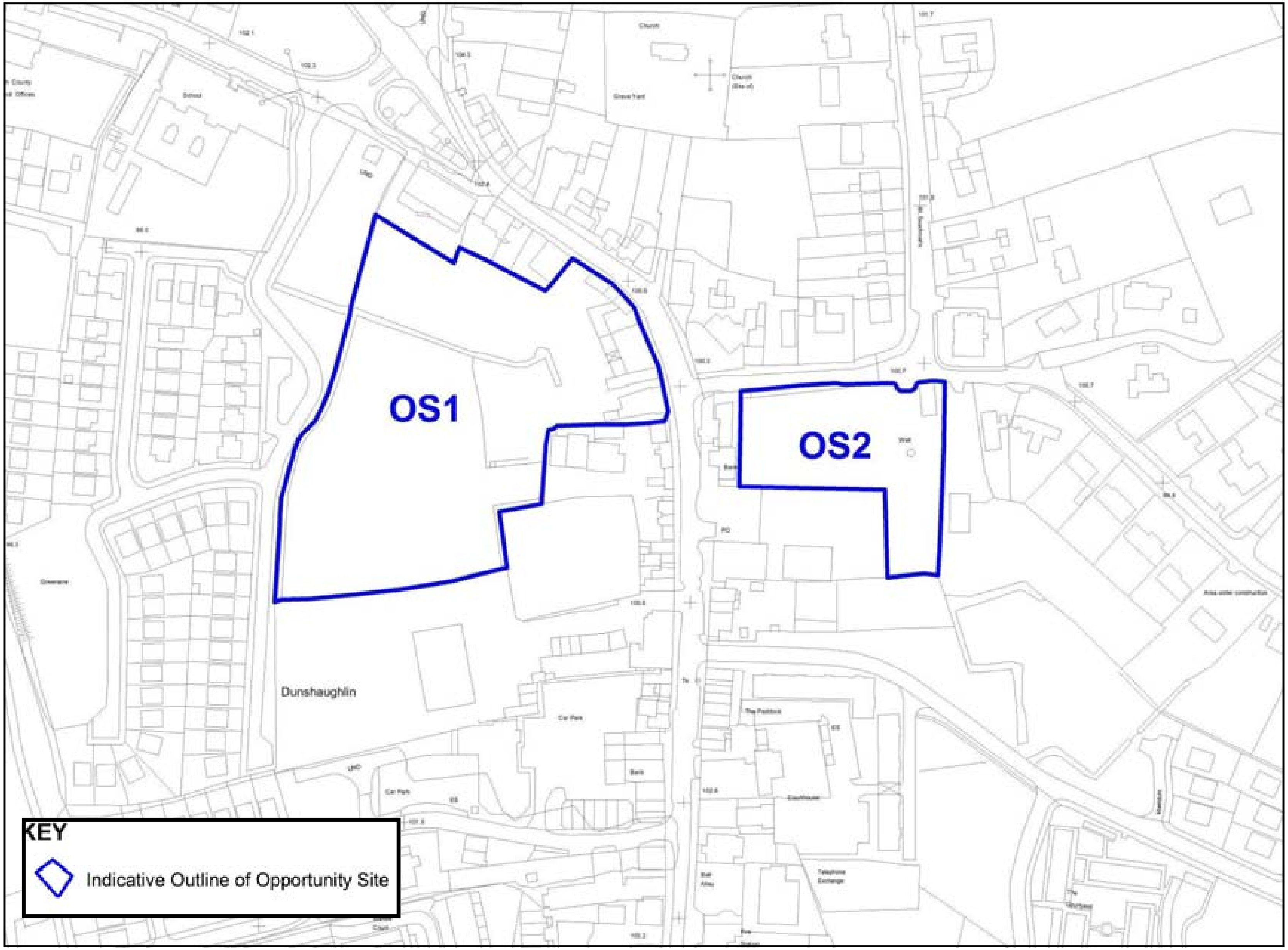


Figure 5.50: Opportunity Sites in Dunshaughlin

Key Actions and Recommendations

~~5.8.26~~5.8.27 The key actions and recommendations arising from this health check are as follows:

(i) There is an urgent need to promote the potential of Dunshaughlin to accommodate additional retail floorspace generally, in particular convenience floorspace;~~;~~

(ii) There is a need to promote identified opportunity sites for retail development and to promote the utilisation of existing vacant premises,and to consider any other proposals on their merits on a case by case basis (as supported by a relevant retail assessment);

(iii) Supporting services, such as leisure and recreational facilities and cafes, bistros, restaurants and other uses which are likely to attract visitors to the town centre should be encouraged;

(i) The town would benefit from improved traffic flows and traffic management on Main Street, with priority given to pedestrians.

Conclusions

~~5.8.27~~5.8.28 The location of Dunshaughlin on the national road network, and served by frequent bus services, means that this is a highly accessible town in County Meath. The town is performing relatively well as a service town for its population and hinterland.

~~5.8.28~~5.8.29 Whilst the town centre is attractive, it~~ and~~ provides a limited~~good~~ range of comparison, convenience ~~and retail~~ services.~~,~~ I~~i~~t is considered that there is scope for the expansion of retail services in the town centre.

~~5.8.29~~5.8.30 The provision of new retail or mixed use development offers the opportunity to address the poor streetscape and visual appearance of the northern end of Main Street through comprehensive and well designed development proposals.

~~5.8.30~~5.8.31 The uptake and utilisation of existing vacant premises in the town centre should also be encouraged. Whilst the town centre has a generally attractive appearance, the presence of vacant units, the poor visual quality of the northern end of Main Street and issues with traffic flow in the town centre detract from the character and appearance of the town centre.

5.9 DUNBOYNE

Introduction

5.9.1 Dunboyne is located adjacent to the southwest boundary of County Meath with Fingal County Council. It lies approximately 2 kilometres west of the M3 route and is connected to the M3 by the R156 (Mullingar to Clonee via Summerhill) and R157 (Maynooth), which converge in the centre of the village.

5.9.2 The Regional Planning Guidelines for the Greater Dublin Area 2010 – 2022 identify Dunboyne, along with Ashbourne, as a Secondary Economic Growth town and states that such towns *"have an important supporting and complimentary role in development economic growth and sectoral strengths in tandem with the primary economic growth towns".*

5.9.3 The RPG's recognise that Dunboyne has failed to realise its long term potential but plays an important role in the area given its status and location on a developing rail line. The RPG's therefore recognise the potential for further growth in Dunboyne, having regard to its strategic location on the rail line.

5.9.4 The Retail Planning Guidelines for the Greater Dublin Area identifies Dunboyne, along with Ashbourne, Dunshaughlin, Kells, Trim and Laytown / Bettystown, as a Level 3 centre, which are town and/or district centres and sub-county town centres. It is clarified that Dunboyne will gradually develop over the next 20 years towards level 2 status. The population of Dunboyne (and environs) was recorded at 5,713 in 2006 and at 6,959 in 2011 (preliminary 2011 Census).

5.9.5 The Meath County Development Plan 2007 – 2013 identifies Dunboyne as a 'Large Growth Town II' with an objective to develop Dunboyne as a key settlement centre in the metropolitan area of the Greater Dublin Area based upon best sustainable planning principles and the integration of land use and transport in order to capitalise on the opening of the rail line to Dublin and create a compact urban form.

SWOT Analysis

Strengths

- Dunboyne is a relatively attractive town, concentrated around the town square, formed by the confluence of Main Street, Navan Road, Maynooth Road and Summerhill Road.

- It is considered that the existence of the rail access inclusive of a rail station within the town is a strength to form the basis of a sustainable rail based settlement.

- Dunboyne's accessibility by virtue of the M3 motorway may be seen as a strength, but also as a threat (see below). Dunboyne's accessibility means that it has the potential to attract visitors from a wide catchment area.

- The Dunboyne Castle Hotel and Spa, located at an edge of centre location and within walking distance of the town centre, is a significant attraction in the town.

Weaknesses

- The quantum and type of comparison and convenience floorspace is relatively poor, both in convenience and comparison terms.

- Eurospar is the main convenience retailer in the town, supported by smaller convenience stores such as Daybreak.

- Comparison retailing is weak. Whilst there are a small number of independent comparison retailers, such as a number of ladies fashion boutiques and a sports and leisure store, there is a notable absence of any national or international multiples.

- The town generally lacks vibrancy and footfall. In addition to an absence of retail facilities, there is an absence of sufficient supporting facilities, such as cafes and restaurants, to attract visitors to the town centre and to retain visitors in the town centre.

Opportunities

- The structure of Dunboyne is not conducive to significant expansion of the retail core. This is due to its relatively compact nature and its formation around the confluence a number of intersecting roads.

- Due to the absence of opportunities for any significant town centre retail development, it will be appropriate to examine opportunities for edge of centre retail development.

- In fact, there is evidence that this trend of developing edge of centre sites is already occurring. Recently completed, and currently vacant, retail units developed as part of mixed use schemes are present to the northern periphery of the town on Navan Road and to the western periphery of the town on Summerhill Road. The latter has 5 no. vacant units at ground floor and the former has 1 no. vacant unit.

- An extant permission exists for a new mixed use (including retail) development on lands adjacent Dunboyne town centre. Permission was granted by the County Council in April 2009 (Reg. Ref. DA802292). This permission has subsequently been upheld by An Bord Pleanala at appeal. This application seeks the provision of c. 5,640 sq. m. of retail space, including a 2,325 sq. m. gross supermarket and 20 no. accompanying retail units.

Photo 5.78: Vacant development at Navan Road

Photo 5.79: Vacant development at Summerhill Road

Threats

- It is apparent from the type and range of retail offer present in Dunboyne that the town suffers from its proximity to larger retail centres such as Blanchardstown and Liffey Valley, as well as Dublin City which is only approximately 20 kilometres away.

- The Aldi and Lidl stores in Clonee represent the closest convenience provision for the residents of Dunboyne, with the exception of the presence of Eurospar on Main Street. This highlights the need to expand the convenience offer of Dunboyne.

Definition of Core Retail Area

5.9.6 The core retail area is concentrated primarily around the southern side of Main Street and the square, and includes parts of Maynooth Road and Navan Road, principally the eastern side as the western side of the street is dominated by the petrol filling station.

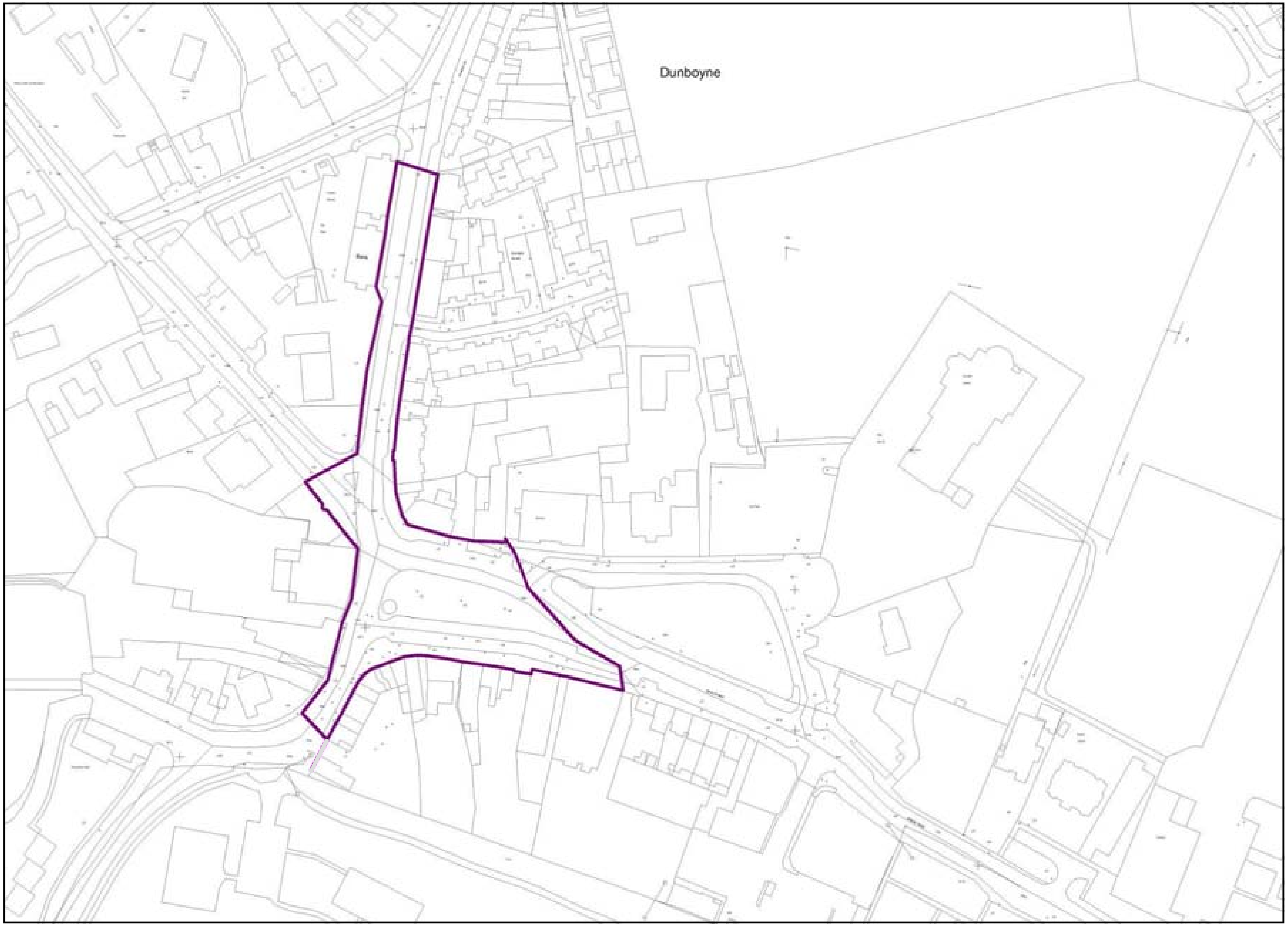


Figure 5.51: Dunboyne Core Retail Frontage

Attractions

5.9.7 As indicated previously, 'Dunboyne Castle Hotel and Spa' is a significant attraction in the town. The town also has a number of sporting facilities and clubs, including a Tennis Club, GAA Club and Football Club.

5.9.8 The retail offer present in Dunboyne is not considered to be sufficient to be an attraction in itself, save to the local residents and immediate surrounding population.

Accessibility

5.9.9 Dunboyne is highly accessible by both public and private transport. It has excellent accessibility to the likes of Blanchardstown Town Centre and Dublin city centre, as well as Dunshaughlin to the north.

Photo 5.80: Dunboyne Rail Station

5.9.10 There is sufficient on street car parking provision, notably on Main Street, to accommodate visitors to the town centre. Additional on-street parking is catered for on Maynooth Road, Summerhill Road and Navan Road. There is no pay and display in operation and there is no maximum stay restriction on car parking in the town centre.

Photo 5.81: Navan Road, Dunboyne

Photo 5.82: Main Street, Dunboyne

5.9.11 In terms of public transport provision, a new railway station, opened in 2010, is located to the eastern ~~perhipery~~ periphery of the town. The station is located on a spur off the Maynooth commuter rail line (joins at Clonsilla) and is served by commuter services with a frequency of approximately every half hour during peak times. Journey times to Dublin Docklands are approximately 30 minutes.

5.9.12 Dunboyne is also served by a number of Dublin Bus and Bus Eireann services. Dublin Bus route 270 connects Dunboyne with Blanchardstown Town Centre with services approximately every hour with a journey time in the region of 25 minutes. This service also serves Clonee. Route 70 connects Dunboyne with Westmoreland Street in Dublin city centre, and also serves Stoneybatter, Ashtown and Littlepace. Services are approximately every hour, with a journey time in the region of 50 minutes. Bus Eireann service 118/119 connects Dublin city centre with Longford, via Dunboyne and also locations such as Summerhill, Ballivor and Mullingar. The service operates three times daily in each direction.

Environmental Quality / Amenity

5.9.13 Dunboyne is a relatively attractive town with wide streets and an attractive streetscape formed by a mix of historic and relatively modern buildings.

5.9.14 The central plaza on Main Street, with its street furniture and planting is a feature and focal point to the town. Footpaths and road surfaces are generally of a good quality, public street lighting is good and there is a wide provision of litter bins.

5.9.15 Permeability through the town centre for pedestrians is provided for by way of good quality footpaths and pedestrian crossing points. Notwithstanding the good provision of footpaths and pedestrian crossings, the town square is dominated by traffic and the visual appearance of the square is negated somewhat by the presence of a petrol filling station on the north-west corner.

5.9.16 A large public open space, which includes a childrens playground and surface car parking, is located on Maynooth Road.

Photo 5.83: Public plaza at Main Street

Photo 5.84: View of the Square in Dunboyne

Photo 5.85: Petrol filling station at the Square in Dunboyne

Photo 5.86: Entrance to park and children's playground on Maynooth Road

Diversity of Uses and Multiple Representation

5.9.17 There is a limited range of uses in Dunboyne. In terms of convenience retail provision, the only notable outlets are a Eurospar, located at the eastern end of Main Street, and a Daybreak store located on Maynooth Road. There is a fresh fruit and veg outlet and a bakery / café located on Navan Road. One butcher was also present on Navan Road.

5.9.18 Comparison provision is weak. With the exception of a small independent sports and leisure outlet on Main Street, a ladies boutique and childrens boutique located on the southern end of the square, and a ladies boutique located on Navan Road, there is no other comparison provision in the town. There are no national or international competitors.

5.9.19 In terms of supporting services, all key services are to be found in the town, including dry cleaners, pharmacies, hair and beauty outlets, barbers, off-licence, hardware store, dental services, bookmakers, banks, (AIB and Bank of Ireland), veterinary clinic, estate agents, and a post office.

5.9.20 In terms of food and beverage uses, these are also limited. There are a number of public houses, approximately 4 no. restaurants and 3 no. take-aways, and only one café, located on Navan Road, which also operates as a bakery.

Rates of Vacancy

5.9.21 Vacancy rates in Dunboyne are low. This is not surprising considering the limited range of retail on offer and the absence of competition within the town. There are no vacant units with the defined town core retail area.

5.9.22 When recent developments located to the northern periphery of the town on Navan Road and to the western periphery of the town on Summerhill Road are taken into account, the vacancy rate is 14%. The figure overleaf shows the location of these vacancies.

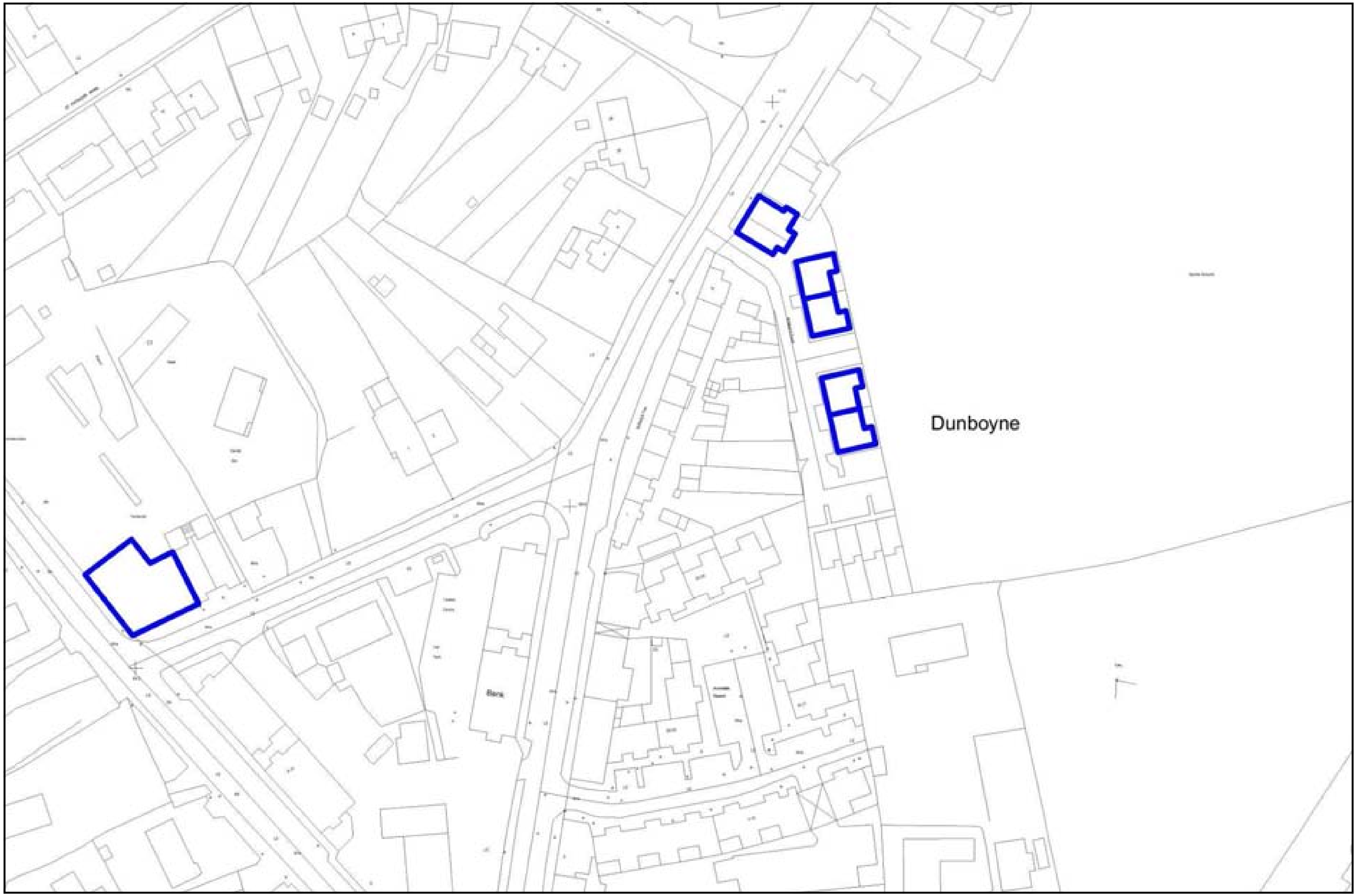


Figure 5.52: Vacancies in Dunboyne

Significant Changes to the retail Environment Since 2003

5.9.23 The Retail Planning Strategy for the Greater Dublin Area (2008) indicates that 690 sq. m. of net convenience floorspace and 885 sq. m. of net comparison floorspace in Dunboyne (both excluding pipeline).

5.9.24 The following recent retail developments in Dunboyne are noted:

- Reg. Ref: DA60443 comprising 5 no. retail units;
- Retail unit at the Fairlands development comprising 1 no. retail unit at ground floor level, permitted under DA40277.

5.9.25 There is no evidence of any other retail developments in the town since 2003.

Retail Opportunity Sites

5.9.26 As previously indicated, the structure of Dunboyne is not conducive to significant expansion of the retail core. This is due to its relatively compact nature and its formation around the confluence a number of intersecting roads. Recent edge of centre developments to the northern periphery of the town on Navan Road and to the western periphery of the town on Summerhill Road offer retail units which are available for occupation.

5.9.27 It is necessary therefore to identify larger sites at edge of centre locations which may be capable of accommodating larger retail development, particularly larger convenience retail development. 3 no. such sites have been identified below.

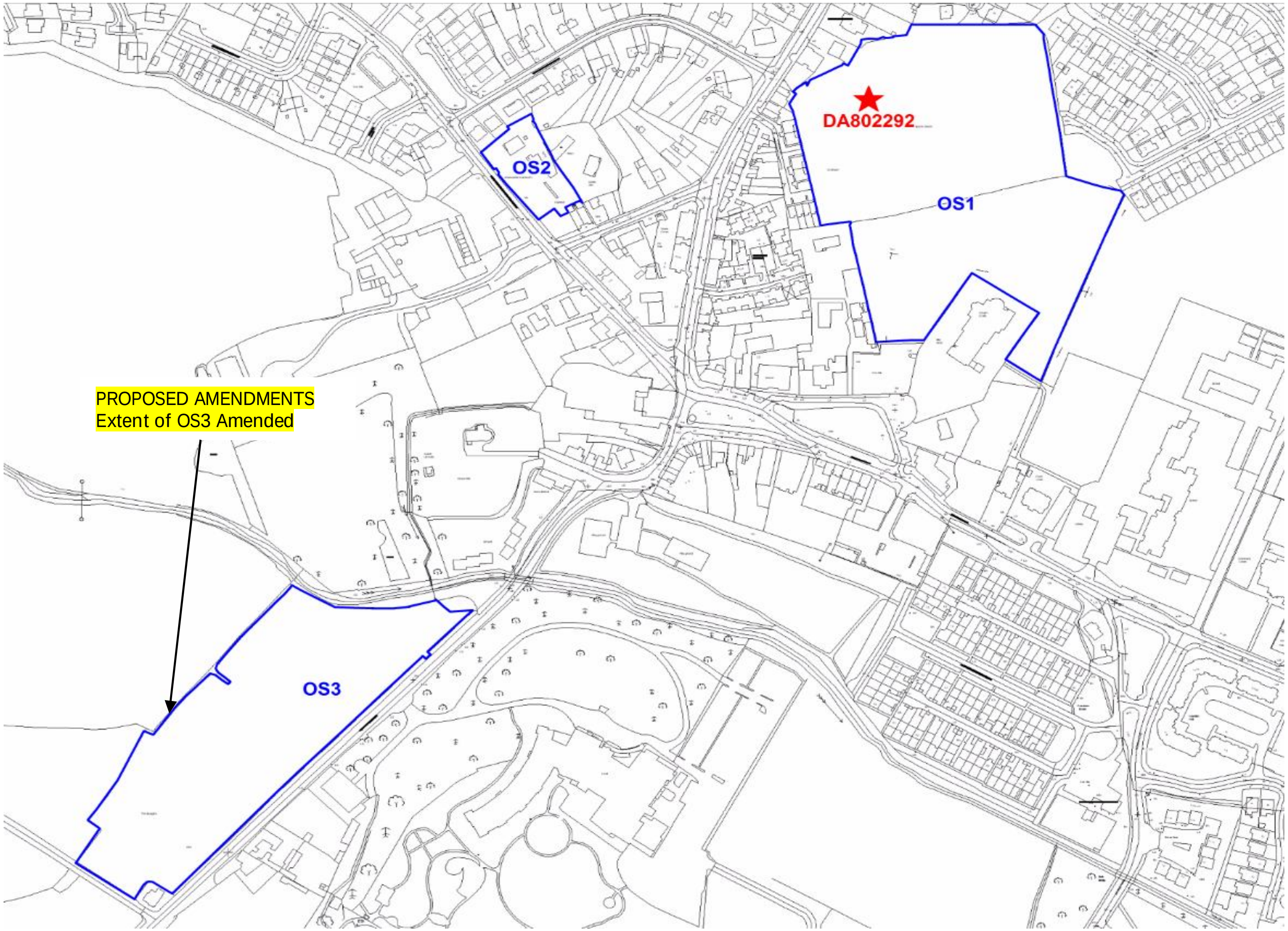


Figure 5.53: Dunboyne Opportunity Sites

OS1: Site located to the rear of the rear of St. Peter and Paul's Catholic Church, Main Street. This is a significant tract of undeveloped greenfield land located off Main Street. It is located to the rear and side of the Church. Access is through the existing Church car park. The Church is a protected structure. The lands are currently zoned primarily for B1 use in the existing Dunboyne Clonee Pace Local Area Plan, with an objective to *"protect and enhance the special physical and social character of the existing town and village centres and to provide for new and improved town centre facilities and uses".* The site to the north which benefits from an extant permission for mixed use development under Reg. Ref: DA802292 also forms part of this site and as such there is potential access from Summerhill Road. The site would be suitable in principle for retail / mixed use development to a high quality design. There may also be potential for expansion of development into adjacent lands to the east and south-east of the Church which are primarily zoned G1 'to provide for necessary community, recreational and educational facilities.

Photos 5.86 and 5.87: Opportunity Site 1, lands to the rear of the Catholic Church, Dunboyne

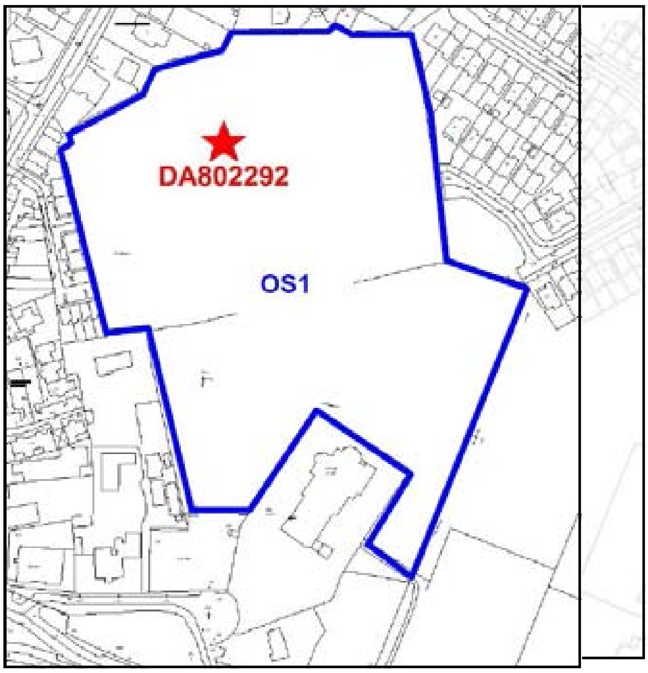


Figure 5.54 OS1 Dunboyne

OS2: This site is located at 'Fairlands' to the northern side of Summerhill Road, in an edge of centre location. These lands are zoned with objective A in the existing Dunboyne Clonee Pace Local Area Plan, with an objective to *"protect and enhance the amenity of developed residential communities".* This site has been cleared of all built development and part of the site has been developed with a residential development with retail space at ground floor level. The development remains vacant.

Photos 5.88 and 5.89: Opportunity Site 2, Summerhill Road, Dunboyne

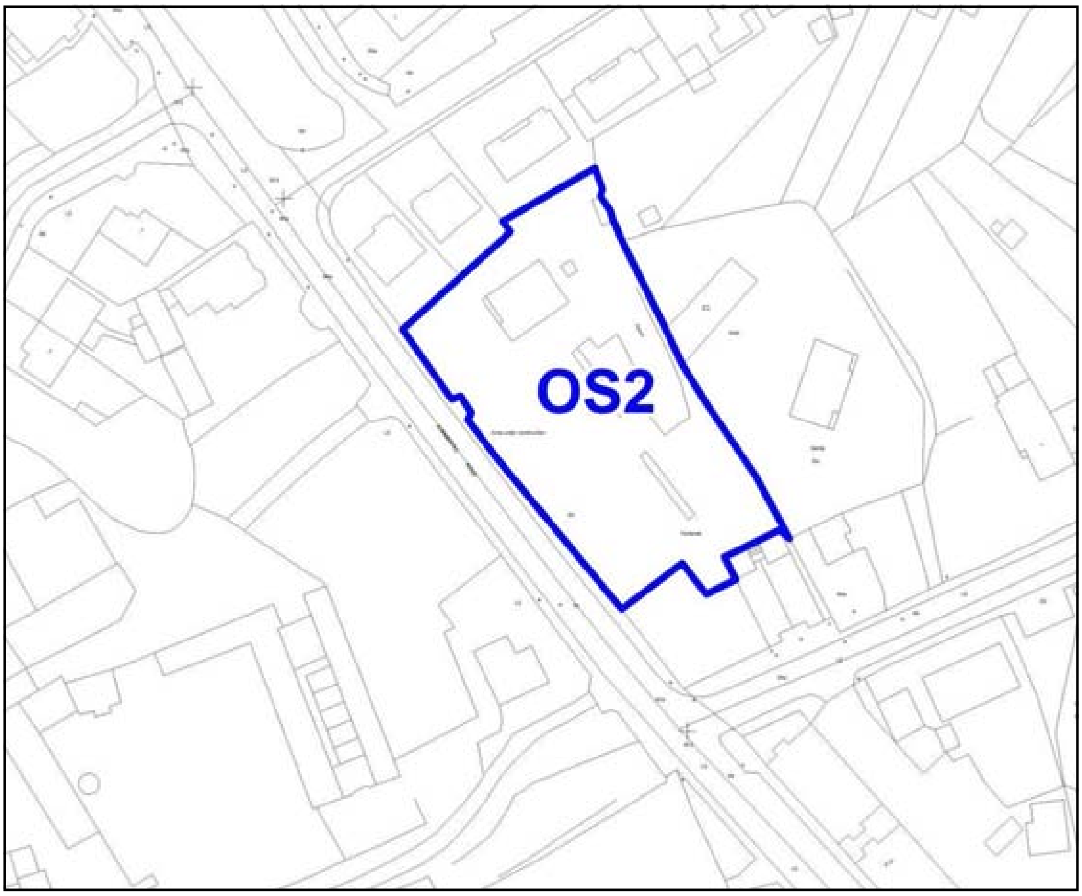


Figure 5.55 OS2 Dunboyne

OS3: This site is located to the south-western periphery of the town, south of the National School on Maynooth Road. This is a large greenfield site currently in agricultural use. This site is zoned with objective A2 in the existing Dunboyne Clonee Pace Local Area Plan, with an objective to *"provide for new residential communities and community facilities and to protect existing communities".* The site has extensive frontage to Maynooth Road and would be suitable in principle for retail development or mixed use development incorporating retail.

Photo 5.90: Opportunity Site 3, Maynooth Road, Dunboyne

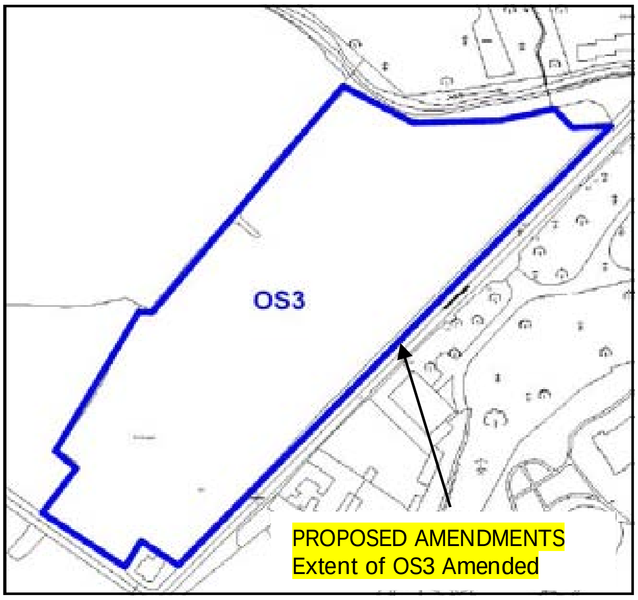


Figure 5.56: OS3 Dunboyne

5.9.28 In addition to these sites, it is noted that there are significant tracts of undeveloped land located adjoining the train station both to the east and west which could be investigated for development. It is considered however that, having regard to the distance of these sites from the town centre, priority should be given to suitable, available and viable sites closer to the town centre, including the opportunity sites identified above.

Photo 5.91: Opportunity for development on lands to the west of Dunboyne rail station

5.9.29 It is also noted that the Dunboyne Clonee Pace Local Area Plan 2009 identifies a significant portion of land to the north of Dunboyne as the preferred location for the expansion of comparison retailing in the area, in accordance with a Framework Plan.

Key Actions and Recommendations

5.9.30 The key actions and recommendations arising from this health check are as follows:

(i) There is a need to promote the potential of Dunboyne to accommodate additional retail floorspace in order to enhance the vitality and viability of the town;

(ii) There is a need in particular for investment in the convenience retail sector. The introduction of a large national or international convenience retailer at an appropriate location may act as a catalyst for further retail development in Dunboyne;

(iii) There is a need to promote identified opportunity sites for retail development;

(iv) Supporting services, such as leisure and recreational facilities and cafes, bistros, restaurants and other uses which are likely to attract visitors to the town centre should be encouraged;

(v) Greater synergy should be provided for between the town centre and Dunboyne Castle Hotel and Spa, which represents one of the key attractions to the town.

Conclusions

5.9.31 Whilst Dunboyne has continued to grow in the recent past, there has not been a corresponding level of development in the retail sector. Despite the population presently, Dunboyne is performing poorly in terms of the provision of retail development to meet the requirements of its residents and catchment population.

5.9.32 The designation of Dunboyne for further growth and its excellent accessibility by both road and public transport means that there is an onus on Dunboyne to provide an appropriate quality and range of retail facilities to cater for the existing and future population.

5.9.33 Whilst the town centre is attractive, compact and easily accessible for pedestrians and motorists alike, it lacks vitality and fails to offer retail outlets which would attract visitors. The town also fails to offer appropriate supporting facilities such as cafes.

5.9.34 As evidenced by vacancies in recent retail development on the edge of the town centre, there would appear to be little demand for smaller scale retail units in the town centre at present. There is a clear need to encourage large scale retail investment in the town, particularly in the convenience sector.

5.9.35 The nature of the town centre means that opportunities for larger scale development is constrained. In this regard, development at identified edge of centre sites should be encouraged.

5.10 Small Towns and Villages and Drogheda Environs

Athboy

5.10.1 Athboy is located to the west of the County proximate to the border with Co. Westmeath. Athboy is located approximately 56 kilometres from Dublin, 17 kilometres from Navan, 12 kilometres from Kells and 11 kilometres from Trim.

5.10.2 The 2006 Census of Population indicates that Athboy has a population of 2,418. The preliminary results from the 2011 Census of Population indicate that Athboy has a population of 2,522.

5.10.3 The town is located on the N51 national primary route, linking with Navan, Slane and Drogheda to the east and Mullingar to the west, via the N52. The R154 regional route also passes through the town, connecting with Trim to the south and Oldcastle to the north.

5.10.4 Athboy has a relatively good range of retail and retail services, offering a number of convenience as well as comparison outlets and in this regard fulfils an important role as a service centre. Retail and retail services provision include McElhinneys Ladies, Gents and Bridal Wear stores, Centra, Mace and Londis. The town also contains the Darnley hotel and a number of pubs and restaurants / café.

5.10.5 The Main Street is heavily trafficked with associated issues with on-street car parking. Opportunities to provide public car parking in the town would be of benefit. In addition the quality of the pedestrian environment, in terms of paving and pedestrian crossings, is in need of improvement.

5.11.6 Athboy has a strong retail offer for a town of its size and has a low level of vacancies. Any expansion should be concentrated in the core retail area which is focused on the main street and adjacent undeveloped backland sites.

Ballivor

5.10.6 Ballivor village is located in the south west of County Meath on the R156 regional road connecting Mullingar approximately 27 kilometres to the west and Dunboyne, approximately 36 kilometres to the east. The village has developed in a linear pattern along the R156 and the main retail facilities present in the town are concentrated along this Main Street.

Photos 5.92 and 5.93: Ballivor Main Street looking west and east, respectively

5.10.7 Ballivor is identified as a village in the settlement hierarchy in the Meath County Development Plan 2007 – 2013. The Meath County Retail Strategy 2003 places Ballivor at Level 4 of the Retail Hierarchy as a 'Tier 2 Village Centre'. It is intended that these village centres will provide local shops and services to meet the needs of existing and expanding populations. It is also identified as a major service centre which are intended to act as sub-regional centres.

5.10.8 The 2006 Census of Population indicates that Ballivor has a population of 1,212 persons. The preliminary results from the 2011 Census of Population do not provide any population figures for Ballivor.

5.10.9 The village has a relatively limited retail offer and includes a Centra, Mace, a grocer's and a newsagents. With the exception of a small independent store providing ladies fashion and accessories, there is no comparison provision of note.

5.10.10 There is a standard range of retail services including a hair salon, a barbers, an opticians, a pharmacy, a veterinary clinic, a dry cleaners, a solicitors office, a bookmakers, and a post office. A credit union is also present. There are a number of public houses, take-aways and a café.

5.10.11 A recently completed development to the western end of Main Street, comprising approximately 6 no. commercial units at ground floor level and residential above remains vacant.

5.10.12 It is considered that Ballivor provides an appropriate range of retail and retail services to meet the needs of the local community.

Photos 5.94: Vacant units to the eastern end of Ballivor Main Street

Clonee

5.10.13 Clonee is located on the N3 national primary route, a short distance to the west of Blanchardstown in Co. Fingal and to the east of Dunboyne. Clonee is approximately 15 kilometres from Dublin.

5.10.14 The 2006 Census of Population indicates that Clonee has a population of 1,000. The preliminary results from the 2011 Census of Population do not provide any population figures for Clonee.

5.10.15 Clonee is identified as a village in the settlement hierarchy in the Meath County Development Plan 2007 – 2013. The Meath County Retail Strategy 2003 places Ballivor at Level 4 of the Retail Hierarchy as a 'Tier 2 Village Centre'. It is intended that these village centres will provide local shops and services to meet the needs of existing and expanding populations. It is also identified as a major service centre which are intended to act as sub-regional centres.

5.10.16 Clonee has a good retail offer in terms of its role as a village centre. Only 1 no. vacant unit was recorded in Clonee.

5.10.17 In terms of convenience provision Clonee contains Aldi and Lidl discount foodstores, and also a Mace and Daybreak.

5.10.18 There is no notable comparison provision in Clonee, which is to be expected given its role and proximity to Blanchardstown Town Centre.

5.10.19 There are also a number of retail services including a number of beauty / hair salons, a bookmakers, a dry cleaners, a barbers and a pharmacy. Also present is a gold exchange outlet and a kitchen store. There is an extant permission for an anchor store of 1,797 sq. m. gross and 9 no. retail units of 1,855 sq. m. gross. This permission has not yet been constructed.

Duleek

5.10.20 Duleek is located in the eastern part of the County between the N1 and N2 on the old railway line between Drogheda and Navan. Duleek is located only approximately 10 kilometres from Drogheda.

5.10.21 The Meath County Development Plan 2007 – 2013 designates Duleek as a Major Service Centre with a sub regional role within the Slane Development Area in the County Urban Settlement Structure. At the County level, it is defined as a Tier 1 Level 4 Small Town Centre.

5.10.22 The population of Duleek has risen dramatically in the recent past due to the increased accessibility offered by the M1 motorway. The preliminary 2011 Census results indicate that the population of Duleek is 5,177, increasing from 4,366 in 2006.

5.10.23 Duleek has a compact, attractive and historic town centre. The town can suffer from traffic congestion at peak times, owing to its location on a through route between Drogheda and Navan.

5.10.24 Duleek town centre is effectively divided into two areas. The traditional town centre to the west end of Main Street provides uses such as a pharmacy, Eurospar, beauty salon, bookmakers, take-away, barbers and a café.

Photos 5.95 and 5.96: Retail to the west end of Main Street, Duleek

5.10.25 Further to the east of Main Street towards Duleek Business Park is a relatively modern development which accommodates a number of retail units at ground floor level, including a pharmacy, barbers, grocers, butchers, a Londis store, a hairdressers and a café. Other notable facilities available in Duleek include a number of public houses, a library and a credit union.

Photo 5.97: Retail development to the east end of Duleek Main Street

5.10.26 Approximately 7 no. vacant units were noted in Duleek, to both the east and west of Main Street.

~~5.10.27~~Duleek primarily meets daily rather than main shopping needs with these being predominantly met in Drogheda, Navan and Dublin. Having regard to the population of Duleek, there may be a demand for further convenience retail facilities in order to negate the need to travel to neighbouring centres such as Drogheda and Navan.

5.10.27

5.10.28 Approximately 7 no. vacant units were noted in Duleek, to both the east and west of Main Street.

5.10.29 The Retail Planning Strategy for the Greater Dublin Area (2008) indicates that 1,127 sq. m. of net convenience floorspace and 420 sq. m. of net comparison floorspace in Duleek. There is no evidence of any significant development having taken place since.

Kilmessan

5.10.30 Kilmessan is located approximately 13 kilometres from Navan, 10 kilometres from Trim and 10 kilometres from Dunshaughlin. Kilmessan is not located on the national or regional road network and is accessible only by local roads.

5.10.31 Kilmessan is identified as a 'Local Centre' in the Meath Retail Strategy 2003 where essential local commercial and community services should be provided. It is identified as a village i~~o~~n the Meath County Development Plan 2007 – 2013, where the policy is to ensure that local growth only is catered for.

5.10.32 The population of Kilmessan in 2006 was recorded as 1,162. The preliminary 2011 Census results indicate that the population has increased to 1,436 persons in 2011.

5.10.33 Kilmessan is a linear village the southern end of which is characterised by the Market House, which forms an important visual feature. There are a number of other historic buildings in the village, including the Catholic Church, the library and Glebe House.

Photos 5.98 and 5.99: Kilmessan Village Centre, looking north and south, respectively

5.10.34 Kilmessan has a limited retail offer to reflect its role as a village and local centre. The village contains a Centra, a bookmakers, a butchers, a barbers, a post office and a number of other services such as a restaurant, a credit union, a tiling centre, a wellness centre and a number of public houses. The Station House Hotel is a particular attraction in Kilmessan. 2 no. vacant units were recorded in the village.

5.10.35 In terms of its role as a village and local centre, it is considered that whilst the retail offer is relatively good, it could be supplemented by additional convenience retail and other services such as a café, bakery, etc.

Nobber

5.10.36 Nobber is located approximately 58 kilometres to the north-west of Dublin, approximately 18 kilometres from Navan, 13 kilometres from Kells, and 14 kilometres from Ardee in Co. Louth. Nobber is located between the N2 and M3/N3, two national primary routes.

5.10.37 The population of Nobber in 2006 was recorded as 652. The preliminary 2011 Census results indicate that the population has increased to 747 persons in 2011.

5.10.38 Nobber is identified as a village in the settlement hierarchy in the Meath County Development Plan 2007 – 2013. The Meath County Retail Strategy 2003 places Nobber– at Level 4 of the Retail Hierarchy as a 'Tier 2 Village Centre'. It is intended that these village centres will provide local shops and services to meet the needs of existing and expanding populations. It is also identified as a major service centre which are intended to act as sub-regional centres.

Photos 5.100 and 5.101: Nobber village centre

5.10.39 Compared to other similar villages, particularly Ballivor, it is considered that Nobber has a relatively poor retail offer. The only convenience provision of note is a Centra. Other retail and retail services present include a butcher, pharmacy, café, hairdressers, beauty salon, bookmakers. Also present are a post office, a restaurant, a take-way and two public houses.

5.10.40 The village centre has a run-down appearance and is in need of~~to~~ investment. There is a need for significant public realm upgrade, notably greatly improved pedestrian surfaces in the town centre and reducing the area given to vehicles.

Oldcastle

5.10.41 Located at the confluence of the R195 (Castlepollard to Virginia) and the R154 (Blackbull to Crossdoney), Oldcastle is approximately 85 kilometres from Dublin, 21 kilometres from Kells and 11 km from Virginia.

5.10.42 The 2006 Census of Population indicates that Oldcastle has a population of 1,316. The preliminary results from the 2011 Census of Population do not provide any population figures for Oldcastle.

5.10.43 The Meath County Development Plan 2007 – 2013 designates Oldcastle as a Major Service Centre with a sub regional role within the Kells Development Area in the County Urban Settlement Structure. At the County level, it is defined as a Tier 1 Level 4 Small Town Centre. Although it has a much smaller population than other towns at this level in the hierarchy, Oldcastle provides a wealth of goods and services to its surrounding largely rural catchment.

5.10.44 Development in the town is primarily concentrated around the town square. The town centre of Oldcastle is relatively compact and provides a good range of services.

5.10.45 In terms of convenience, the town is well provided for by Super Valu, Londis and Centra, with a grocers, butchers and newsagents also present. Comparison offer includes a number of ladies fashion boutiques, a furniture store, and electrical store, a number of gift shops, a small independent department store and a mens fashion outlet.

5.10.46 Additional services and facilities include a number of public houses, restaurants and take-aways, bookmakers, estate agents, a café / deli, a charity shop, a number of hair and beauty outlets, pharmacies, a solicitors office, off licences, a barbers, a veterinary clinic, a florist and a dry cleaners. There are 2 no. hotels present in the town. 3 no. vacant units were recorded.

Photos 5.102 and 5.103: The Square in Oldcastle

5.10.47 This range of uses assists Oldcastle in performing its function as a service centre for the surrounding population.

5.10.48 The Retail Planning Strategy for the Greater Dublin Area (2008) indicates that 1,727 sq. m. of net convenience floorspace, 2,238 sq. m. of net comparison floorspace, and 1,100 sq. m. of retail warehousing floorspace is present in Oldcastle. There is no evidence of any notable recent retail or commercial development in or close to the town centre.

5.10.49 The environmental quality in Oldcastle is mixed. Footpaths and roads range from good in the town centre to poor in places on the periphery. The Square, whilst attractive, tends to be dominated by traffic and would benefit from some pedestrian friendly measures.

Ratoath

5.10.50 Ratoath is located to the south east of the County, approximately 5 km from Ashbourne. The town functions as a local service centre to the town itself and its hinterland. It is identified as a small growth town in the County Plan.

5.10.51 The town has experienced significant population increase over the last number of years and has developed as a commuter town. Between 2002 and 2006, the population of the town almost doubled from 3,794 to 7,249 persons.

5.10.52 Retail provision in the town is primarily ~~focussed~~ focused along the linear Main Street. This has a traditional village character with contemporary additions. A typical range of retail and retail service outlets are represented here including takeaway, newsagent, public house, hairdresser, pharmacy, butcher, bookmaker, credit union, hardware, household etc. Vacancy levels in the traditional town centre are low with the exception of one large vacant site, which is currently surrounded by hoarding.

5.10.53 A new retail development on the approach to the town called the Corbalis Neighbourhood Centre accommodates a Spar. In addition there is a Supervalu and a small Tesco Metro. However, considering the population of the town there is scope for further convenience offer in order to improve competition and choice. It is envisaged that there is significant leakage of expenditure to Ashbourne in this regard.

5.10.54 The town centre has an attractive ambience and streetscape with traditional shop fronts and a good quality public ream.

5.10.55 Appropriate sites for convenience development in the town centre may be constrained due to the traditional layout and existing land use pattern. In this regard, appropriate edge of centre sites may be appropriate for such development subject to the sequential test.

Photos 5.104 and 5.105: Tesco and Super Valu in Ratoath

Slane

5.10.56 Slane is located in the northern part of the County on the northern banks of the River Boyne. It sits halfway between Navan and Drogheda on the N51 which links the two higher order centres.

5.10.57 Slane is identified as a village in the settlement hierarchy in the Meath County Development Plan 2007 – 2013. The Meath County Retail Strategy 2003 places Ballivor at Level 4 of the Retail Hierarchy as a 'Tier 2 Village Centre'. It is intended that these village centres will provide local shops and services to meet the needs of existing and expanding populations. It is also identified as a major service centre, with such centres intended to act as sub-regional centres.

5.10.58 The population of Slane in 2006 was recorded at 1,587. The preliminary 2011 Census results indicate that the population has risen to 1,835.

5.10.59 The village is attractive and displays a traditional appearance. Its key characteristic is its architectural heritage. Slane is ~~a~~ popular in tourism terms and is primarily known for Slane Castle, its heritage and international concerts and events. Slane as a destination also benefits from proximity to Newgrange Tomb and Visitor Centre.

5.10.60 A 30 kilometre per hour speed limit operates throughout the village centre. Traffic congestion can occur at peak hours due to the location of the village on a through route from Navan to Drogheda.

5.10.61 The village has a limited retail offer, with a number of small convenience and comparison stores located on Main Street, and other uses on Main Street being a mix of dwellings, public houses, restaurants, and cafes. Retail and retail services provision includes Gala, a pharmacy, a butchers, a gift shop, an art gallery, a bookmakers. Also present are a health and beauty outlet, a post office, a hotel, a restaurant, a take-away, and a number of public houses.

5.10.62 The Retail Planning Strategy for the Greater Dublin Area (2008) indicates that 600 sq. m. of net convenience floorspace and 513 sq. m. of net comparison floorspace in Slane. There is no evidence of any significant development having taken place since. An extant permission for 4 no. retail units permitted with a gross floor area of 561 sq. metres under SA/802585 (appeal reference 17.232686) at the site of the Parochial House has been permitted but not yet constructed to date.

Photos 5.106 and 5.107: Slane Village

5.10.63 Residents of Slane generally travel to surrounding centres such as Navan and Drogheda for their main convenience and comparison needs. It is considered that Slane does not fulfil its role as a Level 4 Tier 2 centre, primarily due to the absence of an appropriate range and quantum of convenience retail facilities.

5.10.64 There may be potential for Slane to be promoted as a heritage town.

Stamullen

5.10.65 Stamullen lies just off the M1 motorway approximately 35 km north of Dublin. An overpass over the M1 connects the settlements of Stamullen and Gormanston which both have convenient access to the R132, the strategic linkage with Balbriggan.

5.10.66 The population of Stamullen in 2006 was recorded as 3,844. The preliminary 2011 Census results indicate that the population has increased to 4,683 persons in 2011. The scale of population increase in Stamullen is evidenced by the fact that its population in 2002 was only 779 persons.

5.10.67 Stamullen acts as a commuter town due to its proximity to Dublin, Drogheda and Balbriggan, the M1 motorway and the mainline train services at Gormanston.

5.10.68 Stamullen has a limited retail offer and contains a convenience store (Centra), a public house and restaurant, a pharmacy, a barbers, a video rental store, a number of hair and beauty stores, a butchers, café, take-away and estate agents. This retail development is accommodated in a relatively modern development to the eastern end of Stamullen.

Photo 5.108: Retail development in Stamullen

5.10.69 Located a short distance from Stamullen at the M1 motorway interchange is the City North Hotel and Business Park.

5.10.70 Due to the population of Stamullen, additional retail development, particularly convenience retail development, should be encouraged in order to ensure that the needs of the local community are met.

5.11 Drogheda Environs

5.11.1 Drogheda is one of the two principal centres in neighbouring County Louth across the north eastern boundary of the County some 26 kilometres from Navan and 48 kilometres from Dublin. Part of the town's environs sit within Meath and as such require to be taken account of in the County Retail Strategy.

5.11.2 Drogheda is located in a strategic position on the Dublin to Belfast economic corridor, supported by railway line and motorway links. Drogheda has seen more growth in recent years than its counterpart Dundalk due to its proximity to Dublin and the pressure for housing.

5.11.3 The Retail Planning Strategy for the Greater Dublin Area (2008) indicates that Drogheda Retail Park (see paragraph 5.11.24 below) located in County Meath provides circa 10,000 sq. m. net retail warehousing floorspace. Since the preparation of the Strategy, further development has taken place to the southern environs at Colpe Cross.

5.11.4 Significant retail development located within the southern environs of Drogheda includes the recent development of the Southgate Shopping Centre adjacent to the old N1 at Colpe Cross on the southern fringe of Drogheda and the Drogheda Retail Park at Donore Road.

Photo 5.109: Southgate Shopping Centre, Colpe Cross, Drogheda

5.11.5 The Southgate Shopping Centre is anchored by Dunne's and contains 15 no. retail and retail service units and serves a large residential catchment area, including the adjacent Grange Rath residential area and the neighbouring village of Donacarney. Whilst Dunne's Stores and a number of smaller stores, such as a bicycle store, a butchers, florist and an estate agents, there are a number of vacant units in the development.

5.11.6 The Drogheda Retail Park, served off the M1 bypass contains approximately 10,000 sq. m. net retail warehousing. The Retail Park is anchored by Homebase and also includes TK Maxx, Argos, Halfords and DID Electrical. There is also an Aldi discount foodstore of approximately 1,300 sq. m. gross located adjacent to the Retail Park. A large Tesco development has also been constructed close-by, although this is within the administrative area of Drogheda Borough Council.

CHAPTER 6 – COMPETING CENTRES

6.1 INTRODUCTION

6.1.1 This section of the Strategy provides an assessment of competing centres to County Meath. Having regard to the results of the household and shopper surveys (see Chapter 4), the main competing centres are considered to be Dublin, Drogheda, Blanchardstown and Swords. Liffey Valley is also a competing centre although to a lesser extent than the other centres.

6.1.2 The baseline information used for the assessment of the competing centres includes published county retail strategies, site visits and in-house reports.

6.2 BLANCHARDSTOWN TOWN CENTRE

Introduction

6.2.1 Blanchardstown, along with Swords, is identified as a Level 2 (Major Town Centres and County Towns) in the Retail Planning Strategy for the Greater Dublin Area 2008 - 2016.

6.2.2 Blanchardstown Town Centre comprises a shopping centre surrounded by a number of retail parks. In addition, Blanchardstown Town Centre provides a range of leisure and recreation facilities, including County Council offices, UCI cinema, Draiocht Theatre, Blanchardstown Leisureplex, and a public library.

Accessibility

6.2.3 Blanchardstown Centre is located in West Dublin, on the Navan Road/N3, just off the M50 ring road and is located in close proximity to the County Meath border, and the larger centres in the south of Meath, particularly Dunboyne. The Town Centre provides over 7,000 free car parking spaces.

6.2.4 The Town Centre is also served by a range of Dublin Bus services. Route 270 serves Dunboyne and Littlepace.

Retail Facilities

6.2.5 Blanchardstown Town Centre is recognised as one of the key retail locations in the County and the GDA and is one of the few centres which can be defined as ‘higher order’ comparison floorspace (predominantly fashion and furniture operated by national and international multiples). The centre accommodates over 180 stores including 4 department stores.

6.2.6 There is a significant range of comparison retail facilities available at Blanchardstown Town Centre, including national and international multiples such as Diesel, Debenham’s, French Connection, Jack & Jones, Elverys, Marks & Spencer, Pamela Scott, Penneys, River Island, Topshop, and Zara. The Town Centre also boasts a wide range of retail warehousing / bulky goods providers, including Argos, Atlantic Homecare, Carpet Right, Currys/PC World, Harvey Norman, Home Store and More and Mothercare.

6.2.7 To complement the retail services, the Town Centre offers a wide range of food and beverage outlets.

6.2.8 Blanchardstown town centre was observed to generally have a relatively high level of footfall, and is considered to be healthy and vibrant.

<u>Conclusion</u>

6.2.9 Due to its strategic location, strong and diverse comparison retail offer, complementary leisure, food and beverage facilities, and the availability of significant free car parking, Blanchardstown represents a strong attraction for visitors and is considered to be a strong competing centre for towns located in south Meath, particularly Dunboyne and Dunshaughlin, and towns located along and close to the M3 motorway.

6.2.10 The Shopper survey results, as detailed in Chapter 4, reveal that Blanchardstown is the key competing centre to County Meath with 24% of respondents stating that this was their principle destination for comparison shopping. Over 48% of respondents stated that they visit Blanchardstown as a competing centre with 17% of these stating that they travelled there at least once a month for comparison shopping purposes. In this regard, Blanchardstown is the most significant competing centre to the County.

6.3 DROGHEDA

<u>Introduction</u>

6.3.1 Drogheda is one of the two principal centres in neighbouring County Louth across the north eastern boundary of the County and is located some 26 kilometres from Navan and 48 kilometres from Dublin. Part of the town's environs sit within County Meath.

6.3.2 The Regional Planning Guidelines for the Border Region 2010 – 2022 designate Drogheda as a 'Primary Development Centre' where the function is *"to promote and facilitate the development of Drogheda as an important strategic urban settlement in the region and within the Eastern Economic Corridor in support of the Dundalk Gateway".*

6.3.3 The ~~preliminary~~ 2011 Census of Population results show that Drogheda~~ Borough~~ has a population of 38~~0~~,578~~393435~~ in 2011, increasing from 35,090~~28,973~~ in 2006. When the County Meath environs of southern Drogheda are included, these figures increase to 45,994 in 2006 and 52,746 in 2011. ~~The greater Drogheda area, including the Borough area, has a population of 60,870 in 2011, increasing from 57,946 in 2006.~~

<u>Accessibility</u>

6.3.4 Drogheda is located in a strategic position on the Dublin to Belfast economic corridor, supported by the railway line and motorway links. Drogheda has seen more growth in recent years than its counterpart Dundalk due to its proximity to Dublin and the pressure for housing. Drogheda is highly accessible both by road and by public transport.

6.3.5 Pay parking systems are in operation throughout the town centre with multi storey car parking facilities located at Scotch Hall, Dyer Street, Stockwell Lane and the St. Laurence Town Centre, in addition to on-street car parking.

Retail Facilities

6.3.6 The Drogheda Borough Council Development Plan 2011 – 2017 describes that the core retail area is formed by the following streets and areas; West Street, Narrow West Street, Shop Street, Dyer Street, Laurence Street, North Quay, St. Laurence Town Centre Shopping Centre and the Scotch Hall Shopping Centre.

Photos 6.1 and 6.2: West Street and Peter Street Drogheda, Drogheda

Photos 6.3 and 6.4: Shop Street and Scotch Hall Shopping Centre, Drogheda

6.3.7 It is further described in the Development Plan that the core retail area forms the historic heart of the town, with important buildings such as St Peter's Church, the Tholsel, High Lanes Gallery and the Augustinian Church being located in the area.

6.3.8 Significant retail development has ~~occured~~occurred in Drogheda over recent years, including the Drogheda Retail Park on Donore Road and Southgate Shopping Centre, a

Tesco Extra store located adjacent to Drogheda Retail Park (Drogheda Retail Park and Southgate are within the Meath County Council administrative area), the Dunne's Stores anchored Scotch Hall Shopping Centre, the Marks and Spencers anchored St. Laurence Town Centre, and the M1 Retail Park, anchored by Woodies, on the Mell Road. Phase 2 of the Scotch Hall Shopping Centre development is currently under construction.

6.3.9 The Drogheda Retail Park at Donore Road is anchored by Homebase and includes such provision as TK Maxx, Argos, Halfords, and DID Electrical. The M1 Retail Park at Mell is anchored by Woodies and includes outlets such as Smyths, Heatons, Mothercare and Cost Plus Sofas.

6.3.10 The opening of Scotch Hall and the St. Laurence Town Centre, in 2005 and 2006 respectively, has had the effect of creating flagship retail developments at the southern and eastern edges of Drogheda. This has led to a detrimental impact on the traditional town centre concentrated around West Street.

Conclusion

6.3.11 Drogheda's accessibility and strong offer in terms of retail warehousing, comparison and convenience retailing make it an attractive centre for surrounding settlements in County Meath.

6.3.12 For example, surrounding centres in Meath such as Duleek, Stamullen and the Bettystown/Laytown/Mornington conurbation are attracted to Drogheda for its range of comparison, convenience and bulky goods provision, whilst larger centres such as Navan and Kells suffer leakage to Drogheda due to the greater range and availability of bulky goods in particular.

6.3.13 16% of those surveyed in the household survey (see chapter 4) stated that Drogheda was their primary destination for comparison shopping. 25% of respondents cited Drogheda as a competing centre that they visit, and of these 38% visit at least once a week. In this regard, Drogheda is a significant competing centre.

6.4 Dublin City Centre

Introduction

6.4.1 Dublin City is the country's capital and largest city. With a population of 506,211 in 2006 and 527,612 in 2011, the target set out in the Regional Planning Guidelines for the Greater Dublin Area 2010 – 2022 is for 563,512 persons in 2016 and 606,110 persons in 2022. The City is supported by the range of services and facilities that would be expected of a capital City.

6.4.2 The Retail Strategy for the Greater Dublin Area 2008 indicates that Dublin City Centre stands alone at Level 1 of the Retail Hierarchy and 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'*.

Accessibility

6.4.3 In accordance with its capital status, Dublin City is unprecedented in Ireland in terms of its accessibility, both by road and public transport. The nature of the national road system in Ireland means that Dublin is directly connected to all major cities and settlements by the national road network.

6.4.4 There are a significant number of public car parks located within the City. Traffic congestion remains problematic during morning and evening peak hours.

6.4.5 Rail links from the city are also important, and include links to Meath, including to Laytown, Drogheda, Enfield and Dunboyne.

Retail Facilities

6.4.6 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.

6.4.7 As described in the Retail Planning Strategy for the Greater Dublin Area (2008), 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.

6.4.8 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.

6.4.9 The Retail Strategy contained at Appendix 4 of the Dublin City Development Plan 2011 – 2017 indicates that:

"The city centre retail core area is the main shopping, tourist and employment destination for the Greater Dublin Area (GDA). In retail terms, the retail core area dominates 'fashion' and higher order comparison goods retailing with the GDA and acts as a significant attraction for persons outside the region. Therefore, the area is at the top of the hierarchy of retail centres within both the GDA and Dublin City Council".

Photo 6.5: Henry Street, Dublin

Photos 6.6: Grafton Street, Dublin

6.4.10 Perhaps the most significant of the extant permissions in Dublin is the scheme known as 'Dublin Central", located on O'Connell Street. Planning permission was granted by An Bord Pleanala on the 24th March 2010 under reference PL29N.232347 (Dublin City Council register reference 2479/08) for a mixed use development on the site. The development applied for consisted of 158,026 sq. m. gross floor space, including 109 no. retail units and an anchor store (56,155 sq. m.), 17 no. café / restaurant / bar units (5,372 sq. m.) and 108 no. residential units. The development will represent a significant addition to the core retail area in Dublin, linking key streets such as O'Connell Street, Henry Street and Parnell Street.

<u>Conclusion</u>

6.4.11 Dublin City Centre is unprecedented in Ireland in terms of retail provision. Despite the economic downturn, the City Centre continues to be healthy and vibrant, offering a significant range of retail facilities. The attraction of the city as a retail destination is enhanced by the significant range of leisure, cultural and historic attractions in the city and excellent accessibility by both road and rail.

6.4.12 In terms of competition, it is apparent that residents of Meath may visit Dublin to avail of services and facilities that are not available in Meath. The results of the Household Survey in Chapter 4 reveal that respondents travelled to Dublin on a regular basis and as often as once a week 15.3%. 9.6~~4~~ % of those surveyed stated that the City was their primary destination for comparison shopping. This is to be expected of a capital city which is the principal retail centre in the country. In addition, there are likely to be linked trips associated with visits to Dublin to avail of the significant tourism, leisure, entertainment and cultural facilities and services on offer.

6.5 Liffey Valley

Introduction

6.5.1 Liffey Valley Shopping Centre, located off the N4 National Primary Route and junction 7 of the M50 Motorway, is a major commercial, shopping and leisure scheme.

6.5.2 The Liffey Valley site has been developed since the mid 1990's and comprises an enclosed shopping centre with multiplex cinema and separate office complex, retail park, hotel, public house, motor mall and other leisure uses, all served by an internal road loop.

6.5.3 Liffey Valley, along with Blanchardstown, is identified as a Level 2 (Major Town Centres and County Towns) in the Retail Strategy for the Greater Dublin Area.

Accessibility

6.5.4 The location of Liffey Valley Shopping Centre on the N4 route, close to junction 7 of the M50 motorway, means that it is located in a highly accessible location. Accessibility from towns and villages in south-west Meath is good by way of the M3 and junction 6 of the M50.

6.5.5 Liffey Valley provides a significant quantum of free car parking which makes the area an attractive destination for both convenience retailing and bulky goods retailing.

6.5.6 Liffey Valley is also served by a number of Dublin Bus services, most notably the 239 service between Liffey Valley Shopping Centre and Blanchardstown Shopping Centre, with hourly services during peak hours.

Retail Facilities

6.5.7 Liffey Valley provides a significant range of retail facilities, including national and international competitors. Comparison retail offer includes Benetton, Burton, Clarks, Dorothy Perkins, Dunnes, Evans, Easons, H&M, Jack and Jones, Lifestyle, Marks and Spencers, New Look, Next,~~-~~ Oasis, River Island, Top Shop.

6.5.8 The retail warehousing offer at Liffey Valley includes the likes of Atlantic Homecare, Carpet Right and Halfords.

6.5.9 The centre also accommodates a range of complementary retail service, restaurant and food and beverage units. Vue Cinema is also a significant attraction.

Conclusion

6.5.10 Liffey Valley is a significant retail centre located to the west of Dublin. It is located within relatively close proximity of retail centres in the south of the County including Clonee, Dunboyne and Dunshaughlin. The results of the Household Survey in Chapter 4 reveal that although not a principle location for comparison shopping, Liffey Valley ~~centres it~~ is a competing centre with ~~7.6%~~15.4% of respondents stating that they shop there on an occasional basis for comparison shopping.

6.6 Swords

Introduction

6.6.1 Swords, along with Blanchardstown, is identified as a Level 2 (Major Town Centres and County Towns) in the Retail Strategy for the Greater Dublin Area.

Accessibility

6.6.2 Swords is located adjacent to the M1 motorway and as such has excellent accessibility to Dublin City Centre and with towns and villages in south-east Meath which are located along the M1 corridor, such as Julianstown, the Laytown/Bettystown/Mornington conurbation, Stamullen and Duleek. Swords is also located only a short distance from Ashbourne and Ratoath.

Retail Facilities

6.6.3 The core retail centre of Swords is identified as the 'frontages from Bridge Street/Chapel Lane along Main Street and to the Malahide Road and incorporating the Pavilions Shopping Centre.

6.6.4 The traditional town centre focused on Main Street generally provides retail services, with uses including restaurants, public houses, take-aways, video rental outlets, banks, etc.

6.6.5 The main focus of convenience and comparison retailing is the Pavillions Shopping Centre. The development of the Pavilions Shopping Centre resulted in the main focus of shopping in the Town Centre shifting south-eastwards, with a clustering of retail activity towards the southern end of Main Street.

6.6.6 The Pavilions Shopping Centre, which is anchored by Superquinn and Dunnes Stores convenience stores, provides the principle retail draw into Swords. The opening of Penneys, which is accessed through the Pavillions and also has frontage to the southern end of Main Street, has improved the retail offer and has enhanced accessibility to the Pavillions. The planned third phase of the Pavilions will further increase Swords' retail profile when implemented.

6.6.7 In addition to offering convenience and comparison retail services, the Pavillions also offers a cinema and a number of foods outlets. There are approximately 2,000 no. car parking spaces, with the first two hours parking free of charge.

6.6.8 Retail outlets present in the Pavillions include Argos, A/wear, Benetton, Best, Clarks, Currys, Diesel, Dunne's Stores, Easons, Elverys, HMV, Hughes & Hughes, Jack & Jones, Mothercare, Pamela Scott, River Island and Superquinn.

6.6.9 Swords is also well catered for in terms of retail warehousing, due mainly Airside Retail Park located to the east of the town, which provides outlets such as PC World, B&Q, Woodies, DID Electrical and Harry Corry.

Conclusion

6.6.10 Due to the presence in particular of the Pavillions Shopping Centre and Airside Retail Park, Swords is performing strongly in retail terms and would offer a similar type of retail provision to the likes of Liffey Valley and Blanchardstown. Its' type and range of offer would also be similar to that found in Drogheda.

6.6.11 Therefore, due to the type and quantum of retail offer and its strategic location, Swords can be seen as a competing centre for County Meath and particularly towns and villages to the south-east of Meath where the closest alternative destinations would be Drogheda and Navan.

Photo 6.7: The Pavillions Swords

QUANTITATIVE ASSESSMENT

7.1 Introduction

7.1.1 This section provides an assessment of the likely capacity in quantitative terms for additional retail floorspace in County Meath. This section reviews and updates the floorspace capacity assessment presented in the 2003 Strategy taking into account the changes to the population and population forecasts. The strategy covers the period from up to 2019 and beyond to 2022. This enables a longer term look at retail planning and potential in the catchment area which is consistent with the Regional Planning Guidelines.

7.1.2 It should be noted that a quantitative assessment of this nature can only act as a broad brush indicator of the likely quantum of floorspace that may be required in an area over a given period. It involves making forecasts for future population expenditure, turnover and other factors and as such the study is based on a number of assumptions and therefore can only provide a broad indication of anticipated capacity. Nonetheless, the quantitative section can give a useful overview of the position.

7.1.3 Furthermore, it should be noted that the figures set out in this section are not intended to be prescriptive thresholds. Rather they are the minimum floorspace targets that need to be achieved in order to ensure that the retail function of the County is reinforced and strengthened.

7.1.4 It should be noted that all figures within this assessment are rounded off to the nearest point of decimal. The base year and price year throughout is 2011.

The Approach

7.1.5 The approach taken is a step by step capacity assessment including the following steps:

- Estimate the population at base and design year.
- Estimate of expenditure per capita on convenience, comparison and bulky household goods at the base year and the design year.
- Incorporate projections on inflows and outflows of expenditure to the catchment area based on the results of the shopper's and household surveys undertaken by Demographics Ireland.
- Estimate of total available expenditure in the base year and design year for residents within County Meath.
- Estimate the likely increase in expenditure available for provision of additional floorspace.
- Estimate the likely average turnover of new floorspace in convenience and comparison goods.
- Estimate the capacity for additional floorspace in County Meath.
- Allocation of floorspace between the main settlements within the ~~each catchment within the~~ County.

7.2 Definition of Study Area

7.2.1 The administrative boundary of County Meath is identified as the study area for the purposes of this assessment. The County is split between 5 separate settlement areas namely, Navan, Ashbourne, Kells, Trim and Bettystown in accordance with the approach adopted within the survey and analysis chapter of the retail strategy. These areas are illustrated on Figure 7.1 below.

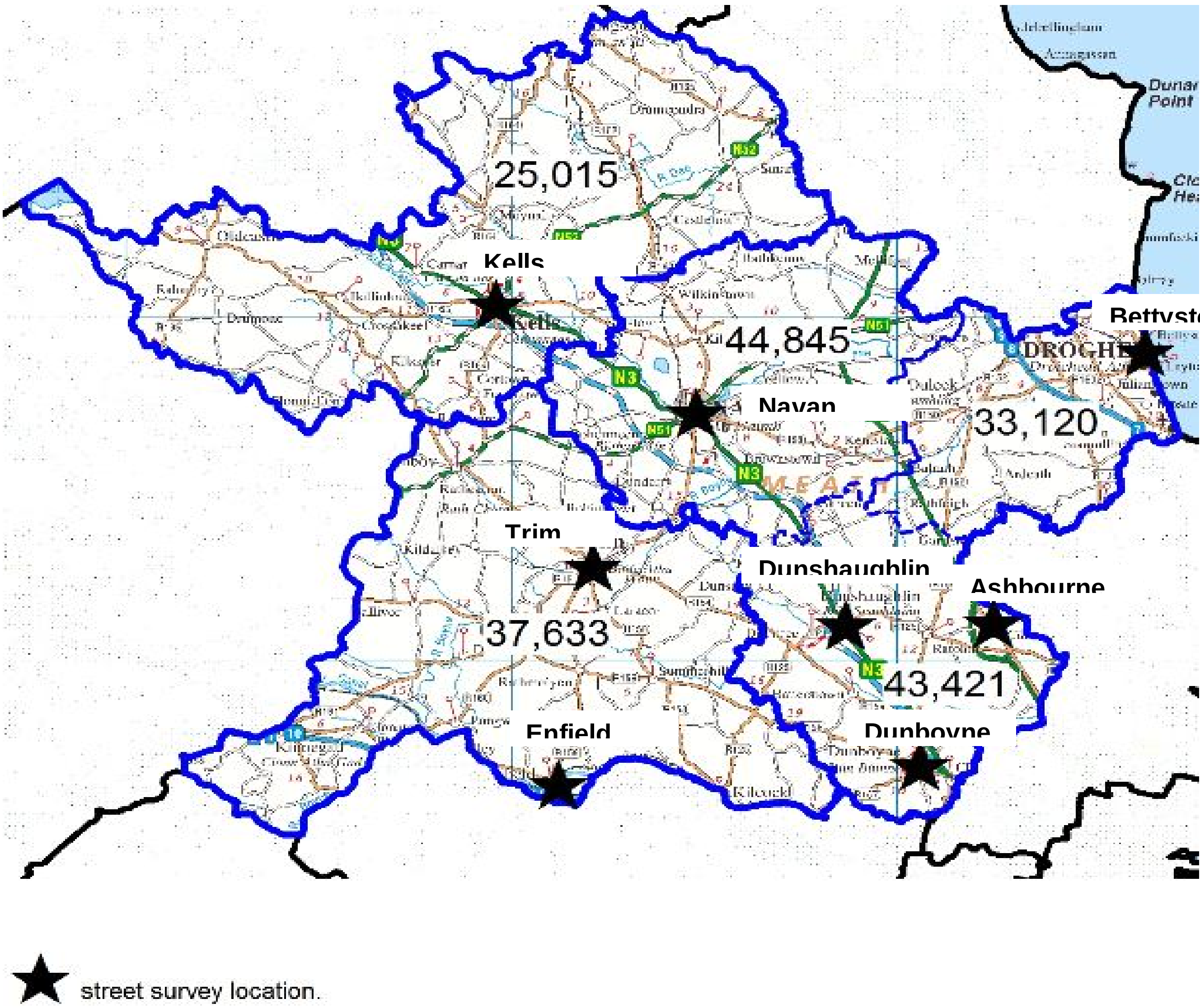


Figure 7.1: Zone Breakdown of County Meath
Source: Demographics Ireland 2011

7.3 Population of the Study Area

7.3.1 The 2006 census carried out by the Central Statistics Office identifies a population of 162,831 persons for County Meath. Preliminary 2011 census figures outline that this has grown to 184,034 in 2011, an increase of 21,203 persons (13%) in the 5 year intercensal period.

7.3.2 Population projections for the county for 2013, 2019 and 2022, as illustrated in Table 7.1 below, are calculated having regard to the figures contained within Meath County Council's Core Strategy and figures used within the Housing Strategy.

Table 7.1: Population Projections

Year	Population
2006	162,831
2011	184,034
2013	188,691
2019	202,966
2022	210,260

Source: Meath County Housing Strategy

7.4 Expenditure per Capita

7.4.1 Expenditure per capita is calculated based on the information contained within the Annual Services Inquiry published by the Central Statistics Office. The most recent Annual Service Inquiry with data in an appropriate format for this purpose is the 2006 Annual Services Inquiry which was published in 2008. This source is therefore used for the purposes of this capacity assessment. ~~The Retail Planning Guidelines[1] examine three principal sources of data on retail planning expenditure in Ireland. These are the Annual Services Inquiry, the National Income and Expenditure Accounts and the Household Budget Survey. The survey concludes that the most reliable data source for established baseline expenditure is the Annual Services Inquiry.~~

7.4.2 ~~The most recent Annual Service Inquiry with data in an appropriate format for this purpose is the 2006 Annual Services Inquiry which was published in 2008. This source is therefore used for the purposes of this capacity assessment. This~~ The 2006 Annual Services Inquiry sets out expenditure per capita figures of €3,402 for 2006 on comparison goods and €3,759 for convenience goods. These figures are updated to a 2011 price year using the CPI. Convenience expenditure per capita is estimated at €3,898 in 2011 and comparison expenditure is estimated at €3,528. In accordance with the CSO publication "County Incomes and Regional GDP", the expenditure figures for County Meath are assumed to be in line with the national average.

7.4.3 It was considered necessary to make a further adjustment to the expenditure figure having regard to the trends observed from the Retail Sales Index. An adjustment is made to provide for a reduction in comparison goods expenditure per capita from 2006 to 2011. While the Retail Sales Index shows that "high street" comparison goods, such as clothing and footwear remain at or above 2006 levels there has been a slight reduction on the overall comparison figure between 2006 and 2011. The population increase as set out in the 2011 preliminary census also means that there

~~[1] Retail Planning Guidelines for Planning Authorities DoEHLG, January 2005~~

has been a greater reduction in per capita comparison expenditure. Having reviewed the figures for comparison goods expenditure as set out in 2006 and 2011 Retail Sales Index, it is considered that a reduction of 5.1% in expenditure per capita from 2006-2011 is appropriate.

7.4.4 An increase in convenience expenditure of 2.2% in the Retail Sales Index was observed between December 2006 and December 2011 and in this regard it was not considered necessary to make an adjustment to the assumption set out within the Annual Services Inquiry. This shows that convenience expenditure changes less in response to changes in incomes than comparison expenditure.

7.4.5 For convenience goods we have assumed a 1% growth rate between 2011 and 2022. This is based on the assessment of long terms trends.

7.4.6 Expenditure growth on comparison goods has been substantially higher than expenditure growth on convenience goods over time. This is because most household's requirements in respect of convenience products have been largely satisfied and most additional expenditure has gone into products such as clothing, footwear, household goods, electrical goods, carpets, furniture and so on. Exceptionally high levels of growth in comparison goods sales were experienced in the late 1990's up to 2007.

7.4.7 However as a result of the recent economic downturn, expenditure per capita has declined in the period 2008 to 2010 and is likely to grow slowly in the next few years in accordance with economic forecasts. We have therefore used a more conservative long term average for projecting forward and we have assumed a growth rate of 2% per annum between 2011 and 2013 and 3% per annum between 2013 and 2022. This is illustrated in Table 7.2.

Table 7.2: Expenditure per Capita

	Convenience	Comparison
2006	€3,898	€3,528
2011	€3,898	€3,348
2019	€4,221	€4,159
2022	€4,349	€4,545

Price Year: 2011, Source 2008 Annual Service Inquiry and CPI

Assumptions: 6.5% reduction in comparison expenditure between 2006-2011, 2.2% reduction in convenience expenditure between 2006-2011, 1% growth in convenience expenditure per annum from 2011 to 2022, 2% growth in comparison expenditure 2011-2013, 3% pa from 2013-2022.

7.5 Total Available Expenditure

7.5.1 The total available expenditure for convenience and comparison goods is set out in Table 7.3 below. This is calculated by multiplying the population by the expenditure per capita for each category for each year.

Table 7.3: Total Available Expenditure

	Convenience	Comparison
2011	€717,364,532	€616,159,082
2019	€856,714,501	€844,193,052
2022	€914,394,503	€955,623,486

Price Year: 2011, Source Tables 7.1 and 7.2

7.5.2 Table 7.3 sets out the total available comparison expenditure available within County Meath. In considering the above expenditure levels, it is important to note that significantly different levels of turnover will apply to town centre comparison goods such as clothing and footwear and smaller household durables than would apply to bulky household goods sold in retail warehouses. Retail warehouses have a distinct function and are generally located outside of the town centres. It is necessary to establish the expenditure potentially available to town centre comparison floorspace. In this regard, it is considered important to split between expenditure available for bulky household goods and comparison goods within the ~~catchment~~study area. Having regard to the Household Budget Survey and experience elsewhere in this respect, it is estimated that approximately 20% of comparison expenditure will be accounted for by bulky household goods in retail warehouse type premises.

7.5.3 Estimates for expenditure on bulky household goods and pure comparison floorspace are set out in Table 7.4 below.

Table 7.4: Total Available Expenditure – Split between pure Comparison and Bulky Household Goods

	Convenience	Comparison	Bulky Household Goods
2011	€717,364,532	€492,927,266	€123,231,816
2019	€856,714,501	€675,354,442	€168,838,610
2022	€914,394,503	€764,498,789	€191,124,697

7.6 Adjustments to Available Expenditure

7.6.1 Some adjustments are also required to the capacity figures outlined in Table 7.4 above to take into account the levels of trade draw and leakage of expenditure from the study ~~catchment~~ area. Assumptions on both market share and trade draw are informed by the household and shoppers surveys undertaken by Demographics Ireland, the results of which are summarised in Chapter 4 of the Retail Strategy.

Expenditure Retention Levels

7.6.2 The household survey undertaken by Demographics Ireland identifies the following trends within the County:

- Convenience: 78% of respondents surveyed undertook their main food and grocery shopping within County Meath resulting in an outflow of 22%.
- Comparison: 41% of the total respondents surveyed undertook their main clothing and footwear shopping within County Meath, resulting in an outflow of 59%.
- Bulky Goods: 67.8%~~%~~ of respondents undertook their main bulky goods shopping within County Meath, resulting in an outflow of 32.2%.

7.6.3 In terms of trade draw, the shopper's survey undertaken by Demographics Ireland identified an inflow of expenditure of 4% from residents outside of the County. For the purposes of this assessment and in accordance with the results obtained from the shoppers' survey, a 2% inflow for main food and grocery shopping is assumed.

7.6.4 Having regard to the trends identified within the household and shoppers surveys, the following adjustments are made to the total available expenditure within the County ~~catchment~~.

Convenience Expenditure

7.6.5 78% of respondents surveyed within the household survey undertake their main food and grocery shopping within Meath. An inflow of expenditure of 2% is also assumed having regard to the results of the shoppers survey. A retention level of 80% is considered low for a county but not surprising having regard to the proximity of Meath to competing centres. It is estimated that this level of retention will grow to 85% over the lifetime of the strategy and that the 2% level of inflow will continue.

Comparison Expenditure

7.6.6 41% of the total respondents surveyed undertook their main clothing and footwear shopping within County Meath.

7.6.7 Two scenarios are assumed in estimating the future amount of comparison goods expenditure available within the survey area. Scenario 1, the low growth scenario, assumes that the existing level of retention and inflows of expenditure to County Meath will remain at current levels over the lifetime of the retail strategy.

7.6.8 Scenario 2 estimates that the level of retention of comparison expenditure within the County will increase within the timeframe of the retail strategy in line with improvements to the retail offer and trade draw of the County. For the purposes of this assessment it is assumed expenditure retention will grow to 60% by 2019 and remain at this level until 2022. It should be noted that this scenario will only materialise if there is significant additional comparison floorspace provision over this period. An inflow of 2% is estimated from 2019 to 2022 under this Scenario as a result of the planned enhancement in comparison retail offer.

Bulky Goods Household Expenditure

7.6.9 The household survey established that approximately 67.8% of respondents undertake their main bulky goods shopping within County Meath. This retention level is assumed for the lifetime of the retail strategy.

7.6.10 Having regard to the above assumptions, the total available expenditure available for convenience, comparison and bulky goods is summarised in Table 7.5 overleaf.

Table 7.5: Total Available Expenditure adjusted to account for Inflows and Outflows of Expenditure								
Period	**Convenience**		**Comparison Scenario 1**		**Comparison Scenario 2**		**Bulky Warehouse Goods**	
2011								
Resident Expenditure		€717,364,532		€492,927,266		€492,927,266		€123,231,816
Less Outflows	**22%**	€157,820,197	**59%**	€290,827,087	**59%**	€290,827,087	**32.2%**	€39,680,645
Spend by resident on Outlets in County		€559,544,335		€202,100,179		€202,100,179		€83,551,172
Add Imported Expenditure	**2%**	€11,190,887	**N/A**		**N/A**		**N/A**	
Spend in retail outlets in Meath		€570,735,222		€202,100,179		€202,100,179		€83,551,172
2019								
Resident Expenditure		€856,714,501		€675,354,442		€675,354,442		€168,838,610
Less Outflows	**15%**	€128,507,175	**59%**	€398,459,121	**40%**	€270,141,777	**32.2%**	€54,366,033
Spend by resident on Outlets in County		€728,207,326		€276,895,321		€405,212,665		€114,472,578
Add Imported Expenditure	**2%**	€14,564,146	**N/A**		**2%**	€8,104,253	**N/A**	
Spend in retail outlets in Meath		€742,771,472		€276,895,321		€413,316,918		€114,472,578
2022								
Resident Expenditure		€914,394,503		€764,498,789		€764,498,789		€191,124,697
Less Outflows	**15%**	€137,159,175	**59%**	€451,054,286	**40%**	€305,799,516	**32.2%**	€61,542,153
Spend by resident on Outlets in County		€777,235,327		€313,444,504		€458,699,274		€129,582,545
Add Imported Expenditure	**2%**	€15,544,707	**N/A**		2%	€9,173,985	**N/A**	
Spend in retail outlets in Meath		€792,780,034		€313,444,504		€467,873,259		€129,582,545

Source: Table 7.4 & assumptions set out above

7.7 Existing Retail Floorspace within Co. Meath

7.7.1 A survey of existing and constructed floorspace with County Meath has been carried out by Meath County Council to inform the retail strategy. The floorspace figures set out within the 2008 GDA Retail Strategy were updated with floorspace which has been permitted and constructed since that period. This floorspace is classified as convenience, comparison or bulky goods as illustrated in Table 7.6 overleaf.

Table 7.6: Existing Floorspace within County Meath 2011	
Convenience	40.099 sq.m.
Comparison	40,284 sq.m.
Bulky Goods	53,403sq.m.

7.7.2 Table 7.6 above does not take into consideration retail floorspace which has been permitted but not yet constructed. Due to the current economic and retail conditions on a national basis, and the considerable uncertainty as to which developments will be implemented and further uncertainty on timing, it is considered that the situation should be reviewed and assessed in considering future applications having regard to the situation at that time. Any implementation of such permissions is likely to be on a much reduced scale from that originally approved, and / or on a phased basis. The location and scale of the proposed retail floorspace will be key in this considering future applications. The appropriate redevelopment and revitalisation of sites within the designated core retail areas and identified opportunity sites will be promoted as a priority.

7.8 Turnover of Existing Floorspace

Turnover Ratios

7.8.1 The turnover figures for 2011 set out in Table 7.5 above are an estimate of the amount of expenditure that is currently being sustained by the estimated amount of floorspace in the County. For example in 2011 Meath had 40,099 sq.m. convenience floorspace which is estimated to be generating a turnover of €558 million, 40,284 sq.m. of comparison floorspace which is estimated to be generating €199 million, and 53,403 sq.m. of bulky household floorspace which is estimated to be generating €66 million. Looking at indicative turnover ratios (turnover divided by floorspace), trading conditions in the convenience sector would be considered to be trading at a healthy level (€13,920 per sq.m) and possibly point to a degree of overtrading having regard to the nature of convenience floorspace within the County ~~catchment~~ which comprises of mix of modern retail floorspace and smaller symbol stores. Comparison floorspace is trading at an average of €4,942 per sq.m. and bulky goods floorspace is trading at €1,250 per sq.m.

~~7.8.2~~ 7.8.2. It is possible to derive the turnover of existing floorspace within the County ~~catchment area~~ by multiplying the floorspace in each category by average turnover. A turnover of €10,000 per sq. m. is assumed for existing convenience floorspace within the County ~~catchment area~~ in 2011 and €5,000 per sq. m. for comparison floorspace. An average turnover of €2,500 per sq. m. is assumed for bulky goods in 2011 prices. Data available for the turnover of retailers in Ireland is limited and its necessary to use estimate average figures. The figures are based on published retail industry data and have regard to the average turnover per sq.m. calculations established in Annual Reports and Retail Rankings. They reflect the average turnover levels retailers will require to sustain a healthy level of activity. They do not count in the high levels of overtrading that have existed in many areas in recent years.

Table 7.7: Turnover Ratios Assumed for Existing Floorspace			
	Convenience	**Comparison**	**Bulky Goods**
2011	**€10,000**	**€5,000**	**€2,500**

Price Year: 2011

7.8.3 These figures show the average assumed turnover per sq metre of existing floor space overall in Meath. They disguise significant differences in turnover for different shops. In general, multiple branches of national and international multiple shops are located within purpose built shopping centres or other prime locations. Prime town centre shop units will have substantially higher turnover per square metre than shops which are less well located or situated in older inefficient premises and are operated as independents. In particular, it is likely that smaller units have substantially lower turnover per sq. metre than these averages whilst the largest supermarket operators have substantially higher turnover rates per sq. metre.

7.8.4 The turnover of existing retail floorspace within the County is obtained by multiplying the existing floorspace estimates set out in Table 7.6 by the turnover per sq. m estimates set out in Table 7.7. This is illustrated in Table 7.8 below.

Table 7.8: Turnover of Existing Floorspace	
Convenience	€400,990,000
Comparison	€201,420,000
Bulky Goods	€133,507,500

Source: Tables 7.6 and 7.7

7.8.5 The residual surplus for additional retail floorspace within the County is obtained by subtracting the turnover of existing convenience, comparison and bulky goods expenditure as set out in Table 7.8 by the total available expenditure set out in Table 7.5.

Table 7.9: Available Expenditure for Additional Retail Floorspace in Co. Meath			
Year	**Available Expenditure**	**Turnover of existing Floorspace**	**Residual Surplus**
Convenience			
2011	**€570,735,222**	**€400,990,000**	**€169,745,222**
2019	**€742,771,472**	**€400,990,000**	**~~€391,790,034~~ €341,781,472**
2022	**€792,780,034**	**€400,990,000**	**~~€169,745,222~~ €391,790,034**
Comparison Scenario 1			
2011	**€202,100,179**	**€201,420,000**	**€680,179**
2019	**€276,895,321**	**€201,420,000**	**€75,475,321**
2022	**€313,444,504**	**€201,420,000**	**€112,024,504**
Comparison Scenario 2			
2011	**€202,100,179**	**€201,420,000**	**€680,179**
2019	**€413,316,918**	**€201,420,000**	**~~€266,453,259~~ €211,896,918**
2022	**€467,873,258**	**€201,420,000**	**~~€680,179~~ €266,453,259**
Bulky Household Goods			
2011	**€83,551,172**	**€133,507,500**	**-€49,956,328**
2019	**€114,472,578**	**€133,507,500**	**-€19,034,922**
2022	**€129,582,545**	**€133,507,500**	**-€3,924,955**

Source: Table 7.5 and 7.8

7.9 Floorspace Capacity

7.9.1 In order to calculate the requirements for additional retail floorspace within the ~~catchment area~~County, the turnover per sq. m. of future retail floorspace should be divided by the available expenditure figures set out in Table 7.9. For the purposes of this assessment a turnover per sq. m. of €11,000 is assumed for future convenience floorspace, €5,500 for comparison retail floorspace and €2,500 for bulky goods floorspace in 2011 prices.

Table 7.10: County Meath Floorspace Potential				
	Convenience sq.m.	**Comparison sq.m.Scenario1**	**Comparison sq.m. Scenario 2**	**Bulky Goods sq.m.**
2011	15,431	124	124	-19,983
2019	31,071	13,723	38,527	-7,614
2022	35,617	20,368	48,446	-1,570

Source: Table 7.9

7.9.2 The distribution of the above floorspace between the individual towns within the County will reflect the existing and projected population in the County and the identified retail hierarchy. Additional demand for comparison retail floorspace will be promoted within Navan and the Sub County Centres of Ashbourne, Dunboyne, Dunshaughlin, Kells, Trim, Laytown/Bettystown.

7.9.3 It is noted that there are significant extant permissions for town centre schemes in Navan, Kells, Trim, Dunboyne and Dunshaughlin which have not been implemented. The Council is committed to promoting retail development on these key sites. Comparison floorspace is essential in ensuring that the County enhances its retail offer and attraction and claws back some of the leakage of expenditure that is occurring to competing centres such as Blanchardstown.

7.9.4 In terms of convenience provision, it is evident that certain centres most notably Trim, Dunboyne, Kells and Dunshaughlin are under provided for in terms of convenience offer. Convenience development will in particular be promoted in these urban centres in order to improve competition choice and diversity in the retail market.

~~7.9.5 Tables 7.11 to 7.14 below set out the indicative requirements for additional convenience, comparison and bulky goods retailing within the individual zones within the County based on existing trends observed within the household survey. The indicative comparison floorspace figures for Trim and Kells in Tables 7.12 and 7.13 assume that no outflow of comparison expenditure from these centres.~~

~~7.11: Convenience Floorspace Potential~~			
	~~2011~~	~~2019~~	~~2022~~
~~Navan Catchment~~	~~3,491~~	~~7,433~~	~~8,735~~
~~Trim Catchment~~	~~4,972~~	~~7,256~~	~~8,041~~
~~Kells Catchment~~	~~1,276~~	~~3,110~~	~~3,635~~
~~Ashbourne Catchment~~	~~3,047~~	~~6,786~~	~~7,902~~
~~Bettystown Catchment~~	~~2,645~~	~~4,897~~	~~5,609~~
~~Total~~	**~~15,431~~**	**~~29,482~~**	**~~33,921~~**

~~7.12: Scenario 1: Comparison Floorspace Potential~~			
	~~2011~~	~~2019~~	~~2022~~
~~Navan Catchment~~	~~-491~~	~~6,588~~	~~10,081~~
~~Trim Catchment~~	~~1,936~~	~~4,491~~	~~5,820~~
~~Kells Catchment~~	~~-176~~	~~1,877~~	~~2,808~~
~~Ashbourne Catchment~~	~~1,354~~	~~3,265~~	~~4,159~~
~~Bettystown Catchment~~	~~-2,499~~	~~-2,499~~	~~-2,499~~
~~Total~~	**~~124~~**	**~~13,723~~**	**~~20,368~~**

~~7.13: Scenario 2: Comparison Floorspace Potential~~

	~~2011~~	~~2019~~	~~2022~~
~~Navan Catchment~~	~~-491~~	~~19,625~~	~~24,839~~
~~Trim Catchment~~	~~1,936~~	~~9,452~~	~~11,435~~
~~Kells Catchment~~	~~-176~~	~~5,350~~	~~6,739~~
~~Ashbourne Catchment~~	~~1,354~~	~~6,599~~	~~7,932~~
~~Bettystown Catchment~~	~~-2,499~~	~~-2,499~~	~~-2,499~~
~~Total~~	**~~124~~**	**~~38,527~~**	**~~48,446~~**

~~7.14: Bulky Goods Floorspace Potential~~

	~~2011~~	~~2019~~	~~2022~~
~~Navan Catchment~~	~~-5,328~~	~~2,167~~	~~5,841~~
~~Trim Catchment~~	~~2,494~~	~~4,255~~	~~5,159~~
~~Kells Catchment~~	~~544~~	~~1,212~~	~~1,518~~
~~Ashbourne Catchment~~	~~-6,762~~	~~-4,746~~	~~-3,793~~
~~Bettystown Catchment~~	~~-10,564~~	~~-10,007~~	~~-9,736~~
~~Total~~	**~~-19,616~~**	**~~-7,119~~**	**~~-1,010~~**

7.9.5 Tables 7.11 and 7.12 below set out the indicative potential for additional convenience and comparison floorspace in the main towns within the County in accordance with the role of each settlement within the County Retail hierarchy, its population, trends observed from the household survey and existing retail floorspace provision. Having regard to the deficit in capacity for bulky household floorspace set out within Table 7.10 a split between the individual towns is not considered appropriate. Applications for bulky goods floorspace within the County will be considered on their merits.

Table 7.11: Indicative Convenience Floorspace Potential

	2022
Navan	11,000
Trim	5,000
Kells	3,500
Ashbourne	2,000
Dunshaughlin	3,500
Dunboyne	6,500
Other	4,117
Total	**35,617**

Table 7.12 Indicative Comparison Floorspace Potential	
	2022
Navan	10,000-24,000
Trim	1,750-5,000
Kells	1,500-4,000
Ashbourne	1,000-3,000
Dunshaughlin	1,250-3,000
Dunboyne	3,500-7,000
Other	1,368-2,446
Total	**20,368-48,446**

7.9.6 The range of comparison floorspace allocation as set out in Table 7.12 above reflects the capacity assessment above under Scenario 1 and Scenario 2.

7.9.7~~6~~ In considering the potential ~~requirement~~ for additional retail floorspace within the County it ~~–~~should be noted that the floorspace ~~capacity~~ potential figures outlined in Tables 7.10, 7.11 and 7.12 above should not be considered as upper limits, merely as indicative of the scale of new floorspace required to meet the needs of existing and future population and expenditure in the County. The figures in Tables 7.11 and 7.12 may be subject to further updating in the future preparation of individual town development or local area plans. Additional new floorspace may be proposed and this could replace some existing outdated or poorly located retail floorspace. These figures should be seen as minimum rather than maximums. The key consideration is the location of new floorspace.

7.9.8~~7~~ The lower set of figures for comparison floorspace, Scenario 1 in the capacity assessment, ~~in particular~~ are based on a continuation of high leakage of expenditure from the catchment area to competing centres. The level of retention of this expenditure has potential to increase over the lifetime of the strategy in line with an enhanced provision of comparison floorspace within the County as set out within Scenario 2 of the capacity assessment.

7.9.9~~8~~ It is noteworthy that the figures set out in Tables 7.10, 7.11 and 7.12 above do not include for "pipeline" floorspace i.e. floorspace which has already been permitted in the County but not constructed at the time of the preparation of the retail strategy. Such permissions exist in towns such as Navan, Trim and Kells in County Meath. The extent of this floorspace is summarised in Table 7.13~~1~~ below.

~~**Table 7.11: Summary of Pipeline Floorspace**~~			
~~Zones~~	~~Convenience sq.m.~~	~~Comparison sq.m.~~	~~Bulky sq.m.~~
~~Navan Catchment~~	~~3,174~~	~~14,006~~	~~0~~
~~Trim Catchment~~	~~1,727~~	~~1,338~~	~~7,940~~
~~Kells Catchment~~	~~2,170~~	~~12,486~~	~~0~~
~~Ashbourne Catchment~~	~~3,250~~	~~5,162~~	~~359~~
~~Bettystown Catchment~~	~~1,604~~	~~224~~	~~0~~
~~Total~~	~~**11,925**~~	~~**33,216**~~	~~**8,299**~~

Table 7.13 Summary of Pipeline Floorspace

Towns	Convenience sq.m.	Comparison sq.m	Bulky sq.m
Navan	3,149	13,324	0
Trim	1,267	1,106	7,940
Kells	3,025	3,747	2,300
Ashbourne	0	25	359
Dunshaughlin	0	68	0
Dunboyne	1,861	2,015	0
Other	3,478	16,678	0
Total	12,780	36,963	10,240

7.9.10~~9~~ A number of these permitted schemes are significant and there is uncertainty regarding the timeframe for their delivery. Due to the current economic and retail conditions on a national basis, and the considerable uncertainty as to which developments will be implemented and further uncertainty on timing, it is considered that the situation should be reviewed and assessed in considering future applications having regard to the situation at that time.

7.9.11~~0~~ It is noted that if all of the pipeline floorspace permitted was implemented as permitted a significant proportion of the floorspace requirements as set out in Tables 7.10, 7.11 and 7.12 would be met by these schemes. This is particularly of relevance for the comparison floorspace requirements set out within Scenario 1 where the full requirements for additional floorspace up to 2022 are addressed by pipeline floorspace. However it is noted that Scenario 1 assumes that there will be no significant improvements to the comparison retail floorspace within the lifetime of the strategy and that current leakage levels remain throughout the lifetime of the strategy. A pragmatic approach must be taken to such extant permissions and it should be recognised that any implementation of such permissions is likely to be on a much reduced scale from that originally approved, and / or on a phased basis. A case by case consideration of the relevant pipeline floorspace will be necessary in considering any significant retail development. The key consideration in assessing future planning applications is the location of the proposed retail floorspace. The appropriate redevelopment and revitalisation of town centres lands will continue to be promoted as a priority.

CHAPTER 8 – POLICIES AND ACTIONS

8.1 Introduction

8.1.1 The purpose of this chapter is to set out key policies and actions in terms of the future of development of retail facilities in County Meath.

8.1.2 The chapter examines the following issues:

- Retail Hierarchy
- Distribution of Floorspace Requirements
- Specific Objectives for Town Centre Improvements

8.2 Retail Hierarchy

National Level

8.2.1 The principle of a hierarchy of retail centres informs the consideration of zoning for retail developments in development plans and is an essential component of a retail strategy.

8.2.2 The national retail hierarchy is set out in the Retail Planning Guidelines 2012. It reflects the settlement structure of the State.

8.2.3 The ~~new Ddraft~~ Retail Planning Guidelines 201~~1~~2 identify four tiers of shopping provision within the national hierarchy. These are (1) Metropolitan, (2) Regional, (3)Sub-Regional (including District Centres within larger urban areas) and (4) Small Towns and Rural Areas. They also recognise that the four classifications are indicative and the functions provided by each tier overlap in some respects.

8.2.4 Navan is identified as a Sub-Regional shopping location. It is noted that such centres perform important Sub-Regional retailing functions including accommodating national and international retailing chains. Navan is the only centre in the County identified at a national level in the third tier. In this regard, the primacy and retail function of Navan, the County Town, should be promoted to ensure it retains its position in the national hierarchy.

8.2.5 The fourth tier of the hierarchy comprises a large number of towns generally in the 1,500 to 5,000 population category. Although some of the centres have a population somewhat greater than 5,000, Dunshaughlin, Ashbourne, Dunboyne, Kells, Trim, Bettystown/Laytown and Enfield would be examples of such centres, most of which provide basic convenience shopping, either in small supermarkets or convenience shops and lower order comparison shopping. Ashbourne accommodates a greater range of comparison shopping than would normally be found in a centre at this level of the hierarchy.

8.2.6 Beyond these tiers, shopping at the local level is provided in the smaller towns, village stores, corner shops in suburban areas, post-offices and shops attached to petrol filling stations.

8.2.7 The formulation of the retail strategy for the County should ensure that policies and proposals are consistent with the Retail Planning Guidelines 2012 but it should also be forward looking in assessing the County within the national hierarchy both now and in the future.

Regional Level

8.2.8 The Regional Planning Guidelines set out a clear retail hierarchy for the GDA which aims to confirm the role of Dublin City Centre as the prime retailing centre, and to set out a hierarchy of retail centres and county towns.

8.2.9 Navan is designated as a "Level 2 Major Town Centre" within the retail hierarchy in the GDA Strategy. Navan is the only Level Two Major Town Centre in Meath. In relation to Level 2 centres, the strategy acknowledges that Level Two centres should *"offer the widest access to shopping activities for the greatest number of people".*

8.2.10 It is stated that Dunboyne will gradually develop over the next 20 years towards level 2 status. In relation to Level 2 centres, it is stated that it is *"very important that in order to achieve sustainable and inclusive strategy such centres offer widest access to shopping activities for the greatest number of people . . . In planning for growth in town centres, planning authorities should allocates sufficient sites and expansion areas to meet identified need; and where necessary use compulsory purchase powers to bring forward important sites."*

8.2.11 The Strategy identifies Dunboyne, Ashbourne, Dunshaughlin, Kells, Trim, Laytown/Bettystown, Enfield as Level 3 centres, which are town and/or district centres and sub-county town centres.

8.2.12 The guidelines identity level 4 centres as comprising neighbourhood centres, local centres, small towns and villages. Level 5 includes corner shops and small villages.

The Retail Hierarchy of County Meath

8.2.13 A key part of the Retail Strategy is to confirm the retail hierarchy. In determining the hierarchy the following principles were considered:

- Strategic Guidance at a national and regional level.
- The need to protect and enhance the importance of Navan Town as the principal urban centre and retail destination in the County and also to protect the important more localised functions of the significant town centres in the County including Dunshaughlin, Dunboyne, Trim, Kells, and Ashbourne.
- The distribution of future retail floor space relates to the identified existing and future retail hierarchy in the County and its environs and should be appropriate to the scale and character of the centre.
- The distribution of future retail floor space should be linked to the future distribution of population growth.
- The principles of sustainability should be adhered to and future retailing should be concentrated as far as practicable in centres that are served by public transport.
- The need to facilitate competitiveness and innovation in the retail industry.

~~Tier~~	~~Centre~~	~~Meath Retail Hierarchy~~
~~First~~	~~County Town Centre~~	~~Navan~~
~~Second~~	~~Sub County Town Centres~~	~~Ashbourne, Dunboyne*, Dunshaughlin, Kells, Trim, Laytown/ Bettystown, Enfield~~
~~Third~~	~~Local Centres, Small Towns and Villages~~	~~Various~~
~~Other~~	-	~~Drogheda Environs~~

Table 8.1 Retail Hierarchy		
Level	**Centre**	**Retail Hierarchy**
Level 1	**N/A**	
Level 2	**Major Town Centres and County Town Centres**	**Navan**
Level 3	**Town And/Or District Centres and Sub County Town Centres**	**Ashbourne, Dunboyne*, Dunshaughlin, Kells, Trim, Laytown/ Bettystown, Enfield**
Level 4	**Neighbourhood centres, local centres – small towns and villages**	**Various**
Level 5	**Corner Shops/small villages**	**Various**
Other		**Drogheda Environs**

*Dunboyne will gradually develop over the next 20 years towards a Level 2 ~~First Tier~~ Centre in recognition of the status affirmed in the Retail Strategy for the Greater Dublin Area

~~First Tier~~Level 2- Major Town Centres and Sub County Town Centres- Major Town Centre and County Town Centres – Navan is a ~~First Tier~~ Level 2 Centre in the context of the Meath Retail Strategy. This is reflective of its importance as the County Town and the wide range of retail and service functions available in the town.

~~Second Tier~~Level 3- Town and/or District Centres and Sub County Town Centres –Town and/or District Centres and Sub County Town Centres - Ashbourne, Dunboyne, Dunshaughlin, Kells, Trim, Laytown/Bettystown and Enfield are included in this ~~tier~~ level-. These towns perform an important sub county retail role / function and generally include a good range of convenience provision and a modest provision of comparison offer. It is considered that Dunboyne will not achieve ~~First Tier~~ Level 2 Status over the period of the Retail Strategy. Enfield does not currently have the population or retail offer of the larger centres in the third level ~~second level~~.

Level 4~~Third Tier~~ Neighbourhood Centres, Local Centres, Small Towns and Villages. This category includes other small towns and villages in the County including (although not exclusively) Athboy, Ballivor, Clonee, Duleek, Kilmessan, Nobber, Oldcastle, Ratoath, Slane and Stamullen.

Level 5: Corner shops/small villages: various

Other ~~Drogheda Environs:~~ Drogheda Eenvirons contain a relatively large quantum of retail development due to its association with Drogheda, a Level 1 Tier 3 Centre in the national retail hierarchy. Southgate Shopping Centre (District Centre) has recently been constructed at Colpe Cross on the southern fringe of Drogheda and includes a significant office component. The retail provision in Drogheda environs performs an important function in serving the needs of the local and surrounding communities.

The purpose of the County Retail Hierarchy is to indicate the role and importance of each development within the county in order to enable the Council to protect each centre's overall vitality and viability whilst allowing each centre to perform its overall function within the county's settlement hierarchy.

8.3 Distribution of Floorspace Requirements

8.3.1 A capacity assessment is detailed in section 7 of this study. This is based on a number of forecasts and assumptions which may be subject to change.

8.3.2 It is estimated that by 2019 there is a need for 31,071 sq. metres of additional convenience floorspace and 13,723 sq. metres of comparison floorspace under a low growth scenario and 38,527 sq. metres under a high growth scenario. By 2022 it is anticipated that there is a total capacity for 35,617 sq. m. of convenience floorspace and between 20,368 and 48,446 sq. metres of comparison floorspace. There is no requirement for additional retail warehouse floorspace within the catchment up to 2022.

8.3.3 It is recommended that new retail floorspace provision will reflect the existing and projected population in the County and the identified retail hierarchy. Additional demand for comparison retail floorspace will be promoted within Navan and the Sub County Centres of Ashbourne, Dunboyne, Dunshaughlin, Kells, Trim, Laytown/Bettystown and Enfield. .

8.3.4 It is noted that there are significant extant permissions for town centre schemes in Navan, Kells, Trim, Dunboyne and Dunshaughlin which have not been implemented. The Council is committed to promoting retail development on these key sites. The provision of significantly enhanced comparison floorspace is essential in ensuring that the County enhances its retail offer and attraction and claws back some of the significant leakage of expenditure that is occurring to competing centres such as Blanchardstown.

8.3.5 In terms of convenience provision, it is evident that certain centres most notably Trim, Dunboyne, Kells and Dunshaughlin are under provided for in terms of convenience offer. Convenience development will in particular be promoted in these urban centres in order to improve competition choice and diversity in the retail market.

8.3.6 The figures set out above are not to be considered as upper limits, merely as indicative of the scale of new floorspace required to meet the needs of existing and future population and expenditure in the County. Additional new floorspace may be proposed and this could replace some existing outdated or poorly located retail floorspace. These figures should be seen as minimums rather than maximums. The key consideration is the location of new floorspace. The quantum only becomes a critical consideration where new floorspace is proposed outside of the town centre and the issue of likely impact on the town centre as a whole arises.

8.3.7 It is considered that the retail needs of Drogheda Environs are now well provided for by the Southgate development. No further significant retail development in Drogheda Environs is envisaged to be required over the plan period. Local and neighbourhood shop facilities may be delivered in conjunction with significant new residential development.

8.3.8 It may not always be possible to locate larger scale convenience retail provision (in excess of 1,000 sq. metres net) in town centres due to their large floor plate requirements. In this regard, appropriately zoned edge of centre locations may be considered for such development in accordance with the sequential test. However, where possible, future comparison floorspace should be provided in town centre core retail areas.

8.3.9 It should also be noted that some convenience operators now operate stores with a significant comparison element. Detailed consideration of the extent and scale of any such proposals will be given in the context of their potential impact on existing town centres. Such stores can sell clothing, footwear and household items which can impact negatively on established town centres.

8.3.10 A number of potential opportunity sites for the development of convenience and comparison retailing have been identified in Section 5 of this report. This includes sites in the principal County and Sub County Centres which have extant permission for extensive retail development that have not been implemented. In other centres such as Bettystown and Ashbourne, recently completed town centre development have been constructed but have significant levels of vacancy. The Council will work closely with landowners and retailers and other interested parties to help bring forward these sites for development.

8.3.11 In terms of retail warehouse development, the County is well served in terms of bulky household provision. There are two large retail warehouse parks in Navan and a further retail park in Ashbourne. There is an extant permission for retail warehousing in Trim. Vacancy is prevalent in the Ashbourne Park and in the Navan Retail Park. In this regard, a cautious approach will be taken regarding further such development over the period of the strategy. Furthermore, applications to extend the range of goods sold from such parks must be considered in the context of the Retail Planning Guidelines 2012 which detail that the range of goods sold at such locations should be limited to bulky goods where DIY goods or goods such as flatpack furniture are of such size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that large floorspace would be required to display them.. Conditions will be imposed regarding any application relating to an existing or proposed retail warehouse development clearly restricting the sale of goods to bulky ~~household~~ items as defined in the Retail Planning Guidelines 2012 – Annex 1.

Conclusions

8.3.12 In conclusion, the distribution of future floorspace must have regard to the identified retail hierarchy. The development or redevelopment of key sites within Navan and the other identified Sub County Centres for retail development in order for the County to compete as a high level retail destination is of paramount importance. In this regard, Navan will be the target and the focus for higher order comparison retailing. Enhanced retail provision, particularly convenience provision will also be targeted to Ashbourne, Dunshaughlin, Dunboybe, Trim, Kells and Bettystown/Laytown.

8.3.13 It is noted that there are extant permissions for a number of significant retail schemes in the principal towns in the County. Many of these sites are intrinsically linked to the town core area and their development for appropriate retail provision would substantially improve the retail role and function of these towns. The Council will work proactively with key stakeholders to promote development on these key sites and also other opportunity sites identified in Section 5 of this report.

8.4 Specific Policies and Objectives for County Meath

8.4.1 This section will summarise the general appropriate policies and actions that will be implemented to encourage and foster retail development in the principal towns in the County. Whilst it is acknowledged that the development of retail facilities is largely dependant on market demand and retailer requirements, it is envisaged that the following general policies will help promote town centres as vibrant and attractive areas thus encouraging their growth and development for retail, retail service, professional service and other complementary land uses.

8.4.2 It should be noted that Section 5 of this report details some specific actions that will be pursued specifically in relation to each town centre in the County. This section of the report should be read in conjunction with these town specific policies and actions.

Specific Policies and Objectives

8.4.3 Detailed below are a number of general policies and objectives that will be implemented to encourage and foster retail development in County Meath and improve town centres in the County.

Policies

- It is the policy of the Planning Authority to promote and encourage the major enhancement of retail floorspace, primarily comparison goods, and town centre functions in Navan to sustain its competitiveness and importance as a Primary Growth Centre in the Greater Dublin Area.

- It is the policy of the Planning Authority to support the vitality and viability of existing designated centres and facilitate a competitive and healthy environment for the retailing industry into the future by ensuring that future growth in retail floorspace responds to the identified retail hierarchy.

- It is the policy of the Planning Authority to support the development of core retail areas as identified within the County Retail Strategy and reinforce the role and function of the core retail areas.

- It is the policy of the Planning Authority to adhere to the provisions of the sequential approach in the consideration of retail applications located outside of core retail areas.

- It is the policy of the Planning Authority to have regard to the policies and objectives of the Retail Strategy for the Greater Dublin Area 2008-2016.

- It is the policy of the Planning Authority to implement the policies and objectives of the Meath County Retail Strategy.

Objectives

- It is the objective of the Planning Authority to implement the following the specific objectives for County Meath as identified within the County Retail Strategy in order to ensure the continued vitality and viability of town centres, including:

    - Facilitate the identification, promotion and development of key town centre opportunity sites;

    - Promote the revitalisation of vacant and derelict properties/shop units;

    - Encourage infill development and the redevelopment of derelict and obsolete sites;

    - Promotion of ongoing environmental improvements to the public realm;

    - Prevent overdevelopment of particular non retail uses such as takeaways in core retail areas;

    - Promotion of activities including festivals, events and street markets in each town.

General Measures to Promote Town Centres

<u>Promotion of Residential Development and Tourism Facilities in Town Centres</u>

- A key factor in the development of future retail facilities, particularly in some of the more peripheral and declining areas of the County will be the development of a critical mass of population to support additional retail facilities. In this regard, and in the interests of sustainable development, residential development will be promoted and developed in the centres of Navan and the principal Sub County Town Centres in the County. This pattern of consolidation will ensure that town centres become active living centres with the critical mass of population necessary to support a range of facilities and services.

- Retention of tourism expenditure and the development of appropriate synergistic tourism facilities and activities will be important in the future development of towns in Meath most notably Trim and Kells. The further promotion of cultural activities and events will be encouraged to draw visitors to such towns.

Town Centre Forum

- Competing centres such as Blanchardstown and the Pavilions', Swords provide consumers with a high quality and attractive destination, inexpensive or free parking, a strong retail mix, and other attraction together with well developed marketing initiatives. In contrast town centres often have little or no active management. Town centres have evolved organically, without necessarily adapting to the changing demands and needs of the consumer. For town centres to operate more effectively, they must have a clear vision of where they wants to get to and they need co-ordinated planning and management to get there.

- The establishment of a town centre forum for each of the principal towns may assist with addressing this.

- Such a forum would comprise of all of the key stakeholders with a view to agreeing an approach to the future management and enhancement of their town. The town centre forum would be made up of representatives from the County Council/Town Council, retailers, traders and other commercial sector interests. The best results will come from maximum collaboration at a local level to create town centres that people want to use, enjoy and return to. The role of the forum is to agree a strategic plan for the future management and enhancement of the core retail area of their town.

- The key objective of the forum would be to establish well managed and marketed town centres that are safe, clean and vibrant places to shop and do business. The forum would also establish a common budget to deal with such issues as advertising, event management and digital marketing.

- The forum should also establish clear procedures for communicating with Town Council/County Council including one overall co-ordinating point of contact in the town council/county council who will be charged with responding to queries, concerns and issues raised as well as being a direct point of contact on specific issues such as street maintenance. Litter management, lighting etc. Effective Town Centre management by all key stakeholders will be essential in creating well planned, well designed and effective Town Centres.

~~Revitilisation~~Revitalisation of Vacant and Derelict Properties/Shop Units

- Vacant and derelict retail units are issues that all town and village centres face. Vacant units adversely affect the vitality and viability of town centres and can also have a -negative visual impact in the retail core.
- As detailed in the Association of Town Centre Management Good Practice Guide on the Visual Affect of Vacant Units[1]:

  "Visually, vacant units can lead to perceptions of a high street with underlying problems such as high crime rate, a lack of investment and a lack of available goods and services. Consumers who believe there is a lack of activity happening on the high street might be tempted to shop elsewhere to the detriment of the surviving traders. Businesses who are looking to invest in an area might be sceptical of the potential to make a profit from any high street struggling. There is potential for a downward spiral if consumers and businesses go elsewhere."

[1] *Street Operations: The Visual Affect of Vacant Units; A Good Prqctice Guide,* (January 2011), Association of Town Centre Management (UK)

- In this regard, the Council will encourage the development and re-use of vacant and derelict properties or alternatively measures to improve their visual appearance including short or interim measures. Measures that will be encouraged include:

  Cover Up of Derelict/Vacant Properties

  - The use of window graphics, shutter covers and hoardings can be an effective means to smarten appearance.

  - The use of external sponsors to meet the cost of erecting quality hoarding or window graphics in return for either utilising portions of the hoarding space for advertising or identifying other advertising sites that would be attractive will be promoted by the Council.

  Pop Up Shop

  - The utilisation of empty units as spaces to promote cultural and community events – visual, musical and theatrical applications. Examples include:
    - Encourage local community groups/ artist groups/ art colleges to transform empty spaces/ empty windows so they become an attraction rather than an eyesore.
    - Encourage artists etc to trial the use of empty units for a short period of time.
    - Encourage temporary occupation of vacant units for uses such as charity shop, restaurant etc.

Developing and Promoting Key Town Centre Sites

- A number of opportunity sites have been identified in Section 5 of this retail strategy. It is acknowledged however, that town centre sites can often be complex sites to develop due to various issues, such as land ownership constraints, access problems, conservation and archaeological issues.

- The Council will encourage and support the appropriate development of key town centre sites.

- A pragmatic approach will be taken in respect of extant permissions for town centre development and it is recognised that any implementation of such permissions is likely to be on a much reduced scale from that originally approved, and / or on a phased basis.

Ongoing Environmental Improvements to the Public Realm

- Many towns in the County have benefited from an ongoing programme of environmental improvement, maintenance and enhancement over the past number of years. Such works are most notable in centres such as Navan and Kells.

- The Council will continue to promote and encourage environmental improvements to the public realm in the key urban centres in the County.

Infill Development

- Consideration will be given to the design and form of infill development within the secondary and peripheral retail streets in the principle town centres. At these locations it can be difficult to attract viable retail development. In this regard, the Council will seek to ensure, through the development management process, that the ground floor units of such infill Town Centre developments (particularly those with an active street frontage) are designed with flexibility, for example higher floor to ceiling heights, to enable their easy conversion to retail or other commercial use if the demand so necessitates. This is to avoid the development of ground floor retail units which remain vacant with no active use which can be detrimental to the vitality and viability of the Town Centre. The feasibility of developing alternatives such as live work units and professional services/own door offices in such infill schemes will also be encouraged by the Council.

After Hours Activity

- The development of the evening and night time economy is an important part of any Town Centre and is essential in ensuring the vitality and viability of town centres, particularly after hours. Town centres can become dead zones after normal retailing hours if there are no attractions to draw people there in the evening.

- In this regard the integration of retail, leisure, restaurants and bars is essential to the promotion of a vibrant Town Centre. The Council will encourage the development of such mixed use schemes in order to encourage the night time economy.

Design and Shop Front Guidelines

- There will be a presumption against inappropriate shop front design and strict enforcement for unsympathetic and unauthorised signage and shop front fascia.

Litter Management

- Poor litter management, street cleaning and bin emptying can detract from a town centre and can have a significant adverse impact particularly from a tourist perspective.

- The Council will encourage and support measures to ensure street cleaning and bin management in all key town and village centres.

Development of Specific Derelict and Obsolete Sites

- Dereliction and obsolescence is evident in many of the key urban centres in the County. The redevelopment of such proprieties will be promoted and encouraged. A simple action such as painting a derelict building can significantly enhance the aesthetic profile of a street.

- In this regard, the Council will encourage a co-ordinated programme for building maintenance and development, as well as the identification of specific buildings and sites that need to be targeted immediately in the County.

Festivals and Events and Street Markets

- Festivals and events are critically important in enhancing the attractiveness of town centres as places to visit. Such events can improve footfall and improve vitality and viability of town centres and encourage return visits to the town. The Council will support and encourage such events.

- Markets can also play an important role in attracting footfall to a town centre. They are a critical part of the retail offer and can serve as fundamental traffic drivers to town centres. Existing and potential markets will be supported and encouraged by the Council.

Outdoor Seating

- Temporary street furniture can be a beneficial addition to a town centre allowing customers to enjoy time outside during the summer. They can increase trade for all businesses by inviting people to spend more time in the town centre and encourage the growth of a café culture. However, if such seating is developed on an ad hoc basis it can be an obstruction and in some instances cause a nuisance. Temporary street furniture may also be of low quality and not fit with the existing character of the streetscape.

- In this regard, it the Council will encourage and support the provision of outdoor seating in appropriate locations.

Retail Policies for Towns and Settlements within County Meath

Navan

8.4.4 The key objectives in respect of Navan include:

- Promote the significant new retail development in the town centre to enhance the function of Navan town centre a as a Primary Growth Centre and to significantly reduce comparison outflows for Co. Meath.

- Identify measures to address traffic congestion in the town centre and improve pedestrian permeability, including measures to seek to remove significant amounts of through-traffic from the town centre, whilst ensuring that the town car remains accessible by car including a car parking strategy;

- Identify measures to attract national and international multiples to Navan in order to maintain and increase competitiveness. The utilisation of existing vacant premises in the town centre core area and opportunity sites in the town centre and edge of centre locations should be encouraged;

- Generally encourage a greater range of comparison outlets in the core town centre area, including the utilisation of vacant units in the town centre, particularly on Trimgate Street;

- Investigate measures for improving the retail offer and public realm of the area immediately to the south of the Shopping Centre, including encouraging high-end retailers to locate at this location, encouraging active uses and frontages to the Shopping Centre and investigating opportunities for public uses on the square opposite the Shopping Centre which is currently dominated by surface car parking;

- Promote appropriate town centre and edge of centre sites which can accommodate additional retail development, and particularly sites which have potential to attract national and international multiples.

- Establish a town centre forum.

Ashbourne

8.4.5 The key objectives in respect of Ashbourne include:

- Promote the improvement of the public realm, including hard and soft landscaping, improved paving, litter bins, street furniture and lighting.

- Investigate opportunities for greater pedestrianisation both in the town centre and in the High Street development.

- Identify measures to improve pedestrian crossing facilities within the High Street scheme.

- Car parking spaces to be clearly demarcated on Frederick Street and loading bays to be clearly identified. Appropriate parking directional signage to be erected highlighting location of off street parking provision. Erection of car parking information signs on the approach to the town centre should be investigated.

- The vacant retail street within the High Street Scheme is a significant issue and affects synergy between this development and the traditional town core. In this regard, innovative measures to promote the use and regeneration of these units should be investigated and promoted.

- Promote the development of key opportunity sites in the town centre and in particular the existing derelict sites at Bridge Street and Bachelors Walk.

Bettystown / Laytown

~~8.4.5~~8.4.6 The key objectives in respect of Bettystown include:

- Identify measures to attract more retail to the town generally, and particularly comparison retail. Such measures might include incentives to occupy vacant units, improvements to the public realm, and incentives to develop the identified opportunity site.

- The utilisation of existing vacant premises in Bettystown town centre and opportunity sites in the traditional town centre should be encouraged. Innovative temporary use of such vacant properties should be encouraged in the interim;

- Investigate measures for improvement to the public realm in the traditional town centre generally;

- Promote additional café, restaurant and gift / tourist shops in the town centre in order to attract tourists to the town centre and provide a link with the retail provision in the town;

- Promote linkages between the traditional town centre and the Bettystown Town Centre development.

~~8.4.6~~8.4.7 The key objectives in respect of Laytown include:

- Recognise the association of Laytown with Bettystown, which is the primary retail service centre in the Laytown- Bettystown-Mornington cluster;
- Support the provision of small to medium scale convenience retail development in Laytown to support the needs of the local community.

Dunboyne

~~8.4.7~~8.4.8 The key objectives in respect of Dunboyne include:

- There is a need to promote the potential of Dunboyne to accommodate additional retail floorspace in order to enhance the vitality and viability of the town;
- There is a need in particular for investment in the convenience retail sector. The introduction of a large national or international convenience retailer at an appropriate location may act as a catalyst for further retail development in Dunboyne;
- There is a need to promote identified opportunity sites for retail development;
- Supporting services, such as leisure and recreational facilities and cafes, bistros, restaurants and other uses which are likely to attract visitors to the town centre should be encouraged;
- Greater synergy should be provided for between the town centre and Dunboyne Castle Hotel and Spa, which represents one of the key attractions to the town.

Dunshaughlin

~~8.4.8~~8.4.9 The key objectives in respect of Dunshaughlin include:

- Promote the potential of Dunshaughlin to accommodate additional retail floorspace generally;
- Promote identified opportunity sites for retail development and to promote the utilisation of existing vacant premises, and to consider any other proposals on their merits on a case by case basis (as supported by a relevant retail assessment);
- Support services, such as leisure and recreational facilities and cafes, bistros, restaurants and other uses which are likely to attract visitors to the town centre should be encouraged;
- The town would benefit from improved traffic flows and traffic management on Main Street, with greater priority given to pedestrians.

Kells

~~8.4.9~~8.4.10 The key objectives in respect of Kells include:

- Promote the development of further convenience and comparison retailing in the town centre;

- The potential of a comprehensive upgrade the public realm of Farrell Street should be investigated, to include the provision of public spaces, high quality landscaping and street furniture, and other measures which would attract shoppers and visitors. Improvements to the public realm in the town centre should assist where possible in the interpretation and promotion of Kells unique heritage and importance;

- Identify measures to attract more retail to the town generally, in order to maintain and increase competitiveness;

- The utilisation of existing vacant premises in the town centre core area and opportunity sites in the town centre and edge of centre locations should be encouraged. The development of key backland sites will also be promoted;

- New development should be integrated with the traditional retail areas of the town and should be sympathetic to the heritage and character of Kells. The key objective is to create a vibrant and commercially successful retail sector to the town and its hinterland;

- Encourage additional café, restaurant and gift / tourist shops in the town centre in order to attract tourists to the town centre and provide a link with the retail provision in the town;

- Promote linkages between the retail developments (Kells Shopping Centre, anchored by Supervalu, and Aldi) at an edge of centre location to the north of the town and the town centre.

Trim

~~8.4.10~~8.4.11 The key objectives in respect of Trim include:

- Identify measures to attract national and international multiples to Trim in order to maintain and improve its role as a Sub-County Town Centre. The utilisation of existing vacant premises in the town centre core area and opportunity sites in the town centre and edge of centre locations should be encouraged. It will be necessary to address the constraints which have been identified in relation to the development of these sites;

- Identify measures to improve the retail environment on Market Street and Emmet Street by improving the pedestrian environment and identifying mechanisms to attract higher order uses and improving the streetscape, such as Special Planning Control Schemes;

- Encourage a greater range of comparison and specialist outlets in the core town centre area to increase the attractiveness of Trim as a retail destination;

- Investigate appropriate opportunities to develop the backland areas for retail, commercial and residential uses to increase the level of footfall in Trim town centre, while also respecting the historic fabric of the town centre;

- Proactively work with landowners and other agencies to seek the development of appropriate town centre and edge of centre sites to accommodate additional retail development, overcoming their constraints, and particularly sites which have potential to attract national and international multiples.

Enfield

~~8.4.11~~8.4.12 The key objectives in respect of Enfield include:

- Enfield is a settlement which has potential to expand having regard to its strategic location on the M4 motorway and the Dublin to Sligo rail corridor. The Regional Planning Guidelines designate Enfield as a 'Small Town';

- Identify measures to improve the retail environment on Main Street by improving the pedestrian environment and attracting high quality developments and users to infill and opportunity sites;

- Facilitate opportunities for additional retail / commercial uses to occupy under utilised town centre sites;

- High quality architecture and urban design should be promoted in any future redevelopment to enhance the built environment in Enfield.

Drogheda Environs

~~8.4.12~~8.4.13 It is considered that the retail needs of Drogheda Environs are now well provided for by the Southgate development. No further significant retail development in Drogheda Environs is envisaged to be required over the plan period.

~~8.4.13~~8.4.14 Local and neighbourhood shop facilities may be delivered in conjunction with significant new residential development.

CRITERIA FOR ASSESSING FUTURE RETAIL DEVELOPMENT

9.1 Introduction

9.1.1 The principal aim of this chapter is to provide policy recommendations regarding the assessment of future planning applications for retail development.

9.2 Criteria for Assessing Future Retail Development

9.2.1 All applications for significant retail development should be assessed against a range of criteria. These criteria are set out below. It should be noted that it is not appropriate to assess all applications for new retail development against all the criteria, particularly developments which are clearly in accordance with strategy in Section 8 and small scale developments (less than 1,000 sq. metres –net area.)

9.2.2 Retail impact statements will not necessarily be required for developments less than 1,000 sq. metres net area, unless it is considered that they may have a material impact on the vitality and viability of an existing retail centre. Retail impact statements may not be required for retail developments that are located within identified retail centres in a development plan, including town centres, district centres and neighbourhood centres and–that are clearly in accordance with the strategy.

The Sequential Test

9.2.3 It is stated in the 2012~~05~~ Retail Planning Guidelines:

"Sequential development means that:

1. *The overall preferred location for new retail development is within city and town centres. Retail development may also be appropriate within District Centres identified in the settlement hierarchy at a scale appropriate to the needs of the area and*

2. *Subject to the requirements below, only where the applicant can demonstrate, and the planning authority is satisfied that there are no sites or potential site within a city, town centre or designated district centres should an edge of centre site be considered. In addition, only in exceptional circumstances where it can be demonstrated that there are no sites or potential sites available either within the centre or on the edge of these centres should an out of centre site be considered."*

~~*"The preferred new location for new retail development where practicable and viable is within a town centre (or district or major village centre). Where it is not possible to provide the form and scale of development that is required on a site within the town centre then consolidation can be given to a site on the edge of the town centre so as to encourage the possibility of one journey serving several purposes. An edge of centre site, for the purposes of these guidelines, is taken to be one which is within an easy and convenient walking distance from the primary shopping core of a town*~~

~~*centre. The distance considered to be convenient will vary according to local circumstances but typically is unlikely to be much more than 300 – 400 metres from the edge of the prime shopping area, and less in smaller settlements.*~~

~~*Having assessed the size, availability, accessibility and feasibility of developing both sites and premises, firstly within a town centre and secondly on the edge of a town centre, alternative out of centre sites should be considered only where it can be demonstrated that there are no town centre or edge of centre sites which are suitable, viable and available. This is commonly known as the sequential approach to the location of retail development."*~~

~~9.2.4 The principle of the sequential test is also promoted in the recently published draft Retail Planning Guidelines. It is stated in the draft guidelines:~~

~~*"In line with national policy guidance, this means that the preferred location for new retail development is within city and town centres. Following the sequential approach, if there are no development sites available within a city or town centre, then the next preference should be a location on the edge of the city or town centre. Only where the applicant can demonstrate and the planning authority is satisfied, that there are no sites or potential sites within a city or town centre or on its edge, should out of centre development be considered."*~~

9.2.4~~5~~ The ~~draft~~ Guidelines note that the order of priority for the sequential test is to seek to locate retail development in the city/town centre. Only where it can be demonstrated that there are no sites which are (a) suitable (b) available and (c) viable should an edge of centre or out of centre site be considered.

9.2.56 The suitability of a site refers to such matters as the sites zoning, current land use activity, the size of the site and its capacity to accommodate the development and traffic and transportation issues. Availability refers to issues such as site ownership, ease of assembly and timing of delivery. It is noted in the Guidelines that sites must be genuinely available for development at the time that site acquisition/assembly begins and development must be deliverable within a reasonable time frame. Viability refers to matters such as the financial viability of a development and the cost of site acquisition. Excessive development costs relative to values are also a consideration.

9.2.6~~7~~ The ~~draft~~ G~~g~~uidelines also note:

"The application of the sequential approach requires~~d~~ flexibility and realism on the part of both retail developers and planning authorities, to ensure that the various forms of retailing are developed in the most appropriate locations."

~~*here an applicant can provide evidence that the requirement to set up in the sequentially preferable site is leading to them altering their core business model, and having a detrimental impact on the offering to the consumer, planning authorities may need to demonstrate flexibility in the assessment of the application."*~~

9.2.7 All applications for large retail developments in out of centre or edge of centre locations (in excess of 1,000 sq. metres – net area) should be subject to the sequential test. The criteria noted above (i.e. suitability, availability and viability) must be considered in the assessment of such sites. Planning authorities should also have regard to the format and scale of the retail development proposed when applying the sequential test approach.

9.2.8 In addition to the sequential test, the applicant should address the following criteria and demonstrate whether or not the proposal would.~~ A proposed development should:~~

- Support the long term strategy for city/ town centres as established in the retail strategy/development plan and not materially diminish the prospect of attracting private sector investment into one or more town centres;
- Have potential to increase employment opportunities and promote economic regeneration;
- Have the potential to increase competition within the area and thereby attract further consumers to the area;
- Respond to consumer demand for its retail offering and not diminish the range of activities and services that an urban centre can support;
- C~~c~~ause an adverse impact on one or more city/town centres, either singularly or cumulatively with recent developments or other outstanding planning permissions (which have a realistic prospect of implementation)~~,~~ sufficient to undermine the quality of the centre, ~~including the public realm, ~~or its wider function in the promotion and encouragement of the arts, culture,~~e and~~ leisure, public realm function of the town centre~~ all~~ critical to the economic and social life of the community;
- ~~Not ~~C~~c~~ause an increase in the number of vacant properties in the primary retail area that is likely to persist in the long term;
- Ensure a high standard of access both by public transport, foot, private car so that the proposal is easily accessible by all sections of society;
- Link effectively with an existing town centre so that there is likely to be commercial synergy;
- ~~Have the potential to increase employment opportunities and promote economic regeneration;~~
- ~~Have the potential to increase competition within the area and thereby attract further consumers to the area;~~
- ~~Not diminish the range of activities and services that an urban centre can support.~~

9.2.9 Other criteria that should be considered in the assessment of significant applications include:

- That there is a quantitative and qualitative need for the development.
- The contribution of the development towards the improvement of the town centre in terms of urban design.
- The contribution of the development towards site or area regeneration.
- The role of the development in improving the competitiveness of the town against other competing centres.
- Compliance with development plan policies and objectives.
- The development is easily accessibly by the elderly and disabled/mobility impaired.

9.3 Criteria for Assessing Particular Types of Development

9.3.1 This section sets out the criteria for assessing planning applications for different types of retail development.

Convenience Food Shopping

9.3.2 Where practicable, new convenience retail development should be located within the town centre or within a designated neighbourhood or district centre serving a large residential community. Accessibility is key to the success of such developments and such proposals should be accessible by all modes of transport including pedestrians and public transport. As large convenience shops attract customers carrying out large weekly shopping, it is important that such development should also be served by adequate car parking.

9.3.3 Edge of centre locations for such developments may be appropriate where there is limited room for expansion within an existing town centre. Many towns due to their historic layout, land use patterns and site ownership have a lack of sites suitable to accommodate the larger format convenience operators. This is acknowledged in both the Retail Planning Guidelines ~~(2005) and Draft Guidelines~~ (201~~1~~2) which state:

"In certain limited circumstances however, it may not be possible to bring forward suitable sites on or on the edge of a city or town centre because of the site requirements of large convenience goods stores, heritage constraints in historic towns, or because the road network does not have the capacity to accommodate additional traffic and service vehicles. In these cases, the sequential approach should be used to find the most preferable sites."

~~*"While the focus for retail development will be the centre areas of cities and towns, small historic cities and towns will have sites in their centres that are not suitable in terms of size, parking, traffic generation or servicing arrangements for large scale developments."*~~

9.3.4 Nonetheless, out of centre sites for this type of retail development require careful assessment in terms of their potential impact on nearby centres and will be subject to compliance with the sequential test.

9.3.5 The ~~draft~~ Retail Planning Guidelines impose new caps regarding the maximum size of supermarkets. ~~The draft guidelines note that *"pending finalisation of the draft guidelines, planning authorities should take account of the principles and practices outlined herein both, in their forward planning and development management policies and practice, and in particular should apply the revised retail caps."*~~

~~9.3.6~~ The maximum size of supermarkets in areas outside the four Dublin authorities and the cities of Cork, Limerick/Shannon, Galway and Waterford is 3,000 square metres net sales. ~~Within neighbourhood centres it is recommended that the size of an anchor convenience facility should not exceed 1,500 sq. metres net.~~

9.3.6~~7~~ Where a proposal for a large convenience store involves a significant amount of comparison goods, the application drawings should clearly delineate the floor area to be devoted primarily for the sale of convenience goods. A detailed assessment of the comparison element of such proposals should be undertaken including a full quantitative assessment of the potential impact of that element on existing comparison goods stores within the catchment area.

9.3.7 In areas planned for residential expansion, the development of a neighbourhood centre anchored by a convenience supermarket is prudent. Modest convenience stores may also be appropriate in large industrial / employment zones where they anchor a neighbourhood centre serving the daily shopping needs of workers and employees.

9.3.8~~9~~ The ~~dDraft~~ Guidelines note that no distinction is being made in the G~~g~~uidelines between retailers based on their pricing policies and discount foodstore is no longer stated as a distinct retail type.

9.3.9~~10~~ Discount food stores typically have a floor area of approximately 1,500-1,800 sq metres gross and are served by a surface car park with approximately 80 – 100 spaces. They can contribute to increased competition and choice. The preferable location for such development as with all convenience development is ~~again~~ in the t~~T~~own c~~C~~entre or designated district centre or neighbourhood centre.

District Centres/Shopping Centres

9.3.10 It is noted in the Retail Planning Guidelines that *"the role of a district centre is to provide a range of retail and non retail service functions (e.g. banks, post office, local offices, restaurants, public houses, community and cultural facilities for the community at a level consistent with the function of that centre in the core strategy. They should not serve as a retail destination in their own right sufficient to adversely impact on the city/town centre to which they are subservient. They can be purpose built serving new or expanding suburbs or traditional serving long established communities."*

9.3.11 It is noted that there are extant permissions for substantial town centre developments in the towns of Navan, Kells, Dunboyne and Trim. None of these extant permissions have been implemented. If developed in their current or revised formats, these schemes would substantially improve the retail offer and quality in these towns. In addition there is currently a proposal for a substantial mixed use scheme in Dunshaughlin Town Centre. In Drogheda Environs, the Southgate Shopping Centre has been constructed, and is partly vacant. Substantial retail schemes have also been constructed in Bettystown and Ashbourne, although both have high rates of vacancy.

9.3.12 Proposals to modify existing extant retail permissions to more commercially viable developments should be considered favourably by the Council.

Retail Warehouse Parks

9.3.13 It is recognised in the Retail Planning Guidelines that in general retail warehouses do not fit easily into town centres given their size requirements and the need for good car parking facilities. It is therefore appropriate to group these facilities into planned retail parks on the edge of the town centre if such sites area available or in an out of centre site, if the applicant can demonstrate that there are no suitable edge of centre sites available. Criteria for assessing retail warehouse applications include scale and design of the development, appropriate vehicular access and the quantitative need for such development.

9.3.14 It is noted in the ~~draft~~ Retail Planning Guidelines that because the number of retail parks has grown substantially over the past decade, they are reaching saturation point in some areas. It is noted that this has lead to vacancy in some cases. There are a number of such parks in the County including two in Navan - Navan Retail Park at Athboy Road and Knockumber Road, comprising 9 no. retail warehouse units with a total of approximately 12,000 sq. m. retail warehouse floorspace and the Blackwater Retail Park on Kells Road with approximately 13,000 sq. m. bulky goods retailing. A substantial park has also been developed in Ashbourne with over 14,000 sq. metres of floorspace. There is also an extant permission for a Retail Warehouse Park on the Dublin Road at Iffernock, Trim under Reg. Ref.: TA70464 (ABP Ref.: PL 17.229337), however, this development has not proceeded to date. The success of these parks has been variable with vacancies notable in the Ashbourne Park and Navan Retail Park.

9.3.15 It is noted in the G~~g~~uidelines that that there should in general, be a presumption against further development of out of town retail parks. ~~planning authorities need to carry out a rigorous assessment as to whether or not there is a need for additional retail warehouses in their urban areas.~~ The quantitative assessment in section 7 details deficit capacity for retail warehousing in the County. In this regard, it is envisaged that there will be a limited demand for further retail warehouse development in the County over the period of the retail strategy. Any application for further development should be considered carefully in the context of the existing level of provision. The range of goods sold in existing or planned parks should be restricted to bulky goods as defined in Annex 1 of the Retail Planning Guidelines 2012. These include carpets, furniture (including flat pack furniture), household appliances~~electrical goods~~, bulky DIY items,~~ automotive products~~, ~~household~~ tools and equipment for the house and garden, ~~household appliances~~ bulky pet products, catalogue shops, bulky nursery furniture, audio visual, photographic and information processing equipment and goods which are such a size that they would normally be taken away by car and not be manageable by customers travelling by foot, cycle or bus, or that require large floor areas to display them~~, e.g. furniture in room sets, or not large individually, but part of a collective purchase would be bulky e.g. wall paper and paint.~~. As noted in the G~~g~~uidelines it is acceptable that up to 20~~15~~% of such units be used fort~~t~~ the sale of ancillary products associated with an otherwise bulky good. Such space is to be clearly delineated on planning application drawings to facilitate future monitoring and enforcement

9.3.1~~7~~6 As stated in the Retail Planning Guidelines, individual retail units should not be less than 700 sq. metres and not more than 6,000 sq. metres (including any ancillary garden centre) in size.

~~Factory~~ Outlet Centres

9.3.17 The 2012 Retail Planning Guidelines define outlet centres as *"groups of stores retailing end-of-season or discounted items at discounted prices and are typically located in out of centre locations"*. It is stated in the Retail Planning Guidelines that the success of these centres depends on drawing customers and visitors from a wide catchment area, including tourists, and there may be implications for existing tourist centres and established town centres, even those some distance from the proposals.

~~9.3.17~~9.3.18 Criteria for assessing such development should therefore focus on whether such a development is located in a strategic location to capture expenditure from a very wide catchment area. It must also be demonstrated that the products sold will not be in competition with those currently on sale in typical city/town centre locations.

Such development schemes should preferably be located adjacent to or even within an existing town centre or in a location where a short, high quality public transport link can be provided. Out of centre sites are generally not appropriate for this type of development. Again, as such facilities are primarily geared towards the car borne customer, vehicular accessibility and adequate car parking will be key factors. The potential for such schemes to act as direct competition for town centres in the County will need careful evaluation in each case. As noted in the Guidelines the most appropriate location for outlet centres is likely to be where commercial synergy can be achieved between an outlet centre and an urban centre which would lead to economic benefits for the overall area.

Local Shops and Petrol Filling Stations

9.3.19 Local shops play an important role in providing for daily top up shopping. They are also often easily accessible to the elderly and disabled. The development of such local shops should be encouraged in large residential areas around the principal towns in the County. Such developments should be designed to a high standard and be easily accessible to all members of society.

9.3.20 As stated in the Retail Planning Guidelines, the size of retail units associated with petrol filling stations should not exceed 100 sq metres. Where permission is sought for floorspace in excess of 100 sq. metres, the sequential approach to retail development shall apply.

Retailing in Small Towns and Villages

9.3.21 Small towns and villages play an important role in the lives of the communities that they serve and provide valuable day to day retail facilities and services to their communities. Development in such villages and small towns should be focussed in the core village/town centre area and should complement existing retail provision.

~~9.3.21~~9.3.22 The key objective is to provide and retain a range of retail facilities and services to serve the day to day needs of the village/small town's catchment area. In some small towns in the County, such as Ratoath, there is a clear need to enhance the convenience retail offer. The scale of such provision should however, be cognisant of the retail role and function of such centres within the retail hierarchy.

Retailing in Rural Areas

9.3.23 Retailing in rural areas should be directed towards existing settlements. There are however some circumstances where retail development in a rural area may be appropriate. These include:

- A retail unit which is ancillary to activities arising from farm diversification;
- A retail unit designed to serve a tourist of recreational facility, ancillary to the main use;
- A retail unit attached to a craft workshop;
- A small scale retail unit (not in excess of 100 sq. metres gross) designed to serve a dispersed rural community.

Such proposals should be considered on their merits in accordance with the proper planning and sustainable development of the area.

Casual Trading

9.3.24 Casual trading, including farmers markets, can make a valuable contribution to the local economy and contribute to the vitality and viability of a retail centre. Such activities should be properly regulated as per the provisions of the Casual Trading Act 1995 and consideration should be given to the quality of offer of such casual trading.