Fingal County Council

Fingal County Retail Strategy

October 2004

Final Draft

CONTENTS

DTZ

SECTION **PAGE**

A Report by

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1 INTRODUCTION

1.1 Fingal County Council (the Council) adopted the first County Retail Strategy as a variation to the County Development Plan in May 2003. The Council is currently preparing the Fingal County Development Plan Review 2005 and as part of this process is reviewing the County Retail Strategy (the Strategy). **DTZ Pieda Consulting** was appointed in February 2004 to assist the Council in the preparation of the review of the Strategy. This document contains the **Draft County Retail Strategy**.

CONTEXT

1.2 The context for the Strategy is set by the following:

i. Retail Planning Guidelines for Planning Authorities, December 2000;

ii. Retail Planning Strategy for the Greater Dublin Area (GDA), November 2001; and

iii. Fingal County Retail Strategy, May 2003.

1.3 The influences and considerations taken into account in preparing the Strategy were set out in the Retail Planning Strategy for the GDA. These included:

- Strategic Planning Guidelines (SPG) for the GDA and subsequent reviews, which include the Regional Planning Guidelines for the Greater Dublin Area, 2004 – 2016 issued in July 2004
- Dublin Transportation Office Transportation Strategy – 'A Platform for Change'
- Statutory Development Plans
- Shopping patterns and consumer and market demand
- Retail trends
- Consultation responses.

1.4 Since the first Strategy was drafted in the final months of 2002, a number of key data and other guiding documents have been published that have an important bearing on the shape of the County Development Plan and the revised Strategy. These are:

i. The final results of the 2002 Census of Population;

ii. National Spatial Strategy 2002-2020; and

iii. Regional Planning Guidelines for the Greater Dublin Area 2004-2016 - *'Implementing the National Spatial Strategy'.*

1.5 These data and documents have been reviewed in the preparation of the Strategy to ensure that it is founded in the most up to date information and strategic policy framework. We summarise the key findings from our review of the existing and emerging policy frameworks and data in the paragraphs that follow.

Retail Planning Guidelines for Local Authorities

1.6 In accordance with the *'Retail Planning Guidelines for Planning Authorities'*, published by the Department of the Environment and Local Government ((DoELG) now the Department of Environment, Heritage and Local Government (DoEHLG)) in December 2000, the Council was required to prepare a Retail Strategy for the County and assess the broad requirements for additional development over the plan period. As has been noted, this Strategy was adopted as a variation to the County Development Plan in May 2003.

1.7 The guidelines were issued as Ministerial guidelines under Section 28 of the Planning and Development Act 2000. Section 28 provides that planning authorities and An Bord Pleanála shall have regard to Ministerial guidelines in the performance of their functions. The Retail Planning Guidelines (RPG) were prepared in response to the increasing pressure for retail development in the last decade. They sought to provide the policy framework to enable the future development that is projected to be accommodated in a way that is *'efficient, equitable and sustainable'.*

1.8 The RPG recognised that the detail and complexity required to address retail planning issues varies depending on the extent of urbanisation, population density and number of centres. They state that:

> *'In Metropolitan Dublin, Cork and other major urban centres, there is a far greater requirement for detailed development plan policies than in largely rural centres.'*

1.9 As Fingal is part of the Metropolitan Area of the GDA, then the Council is required to prepare a **detailed retail strategy** that is more detailed than that necessary for more rural locations of the country. The RPG also highlights that in some locations it will be necessary for counties to co-operate with each other in the preparation of retail strategies and identify where this would be appropriate. In the case of Fingal, the Council was required to co-operate with the counties within the GDA, which is an area defined by the SPG (and subsequently the Regional Planning Guidelines for the GDA) and comprises Dublin City (formerly Dublin Corporation), Dun Laoghaire-Rathdown, Fingal and South Dublin (largely the Metropolitan Area) and Kildare, Meath and Wicklow (the Hinterland Area). The consequence was the preparation of the *'Retail Planning Strategy for the Greater Dublin Area'.* The context this provides for the County Retail Planning Strategy is described below.

1.10 Whether a detailed or general strategy is necessary, the retail policies and proposals that emerge from the retail strategies require to be incorporated in development plans. The guidelines state that the matters that are to be included in all future development plans are:

i. *Confirmation of the retail hierarchy, the role of centres and the size of the main town centres;*

ii. *Definition in the development plan of the boundaries of the core shopping area of town centres;*

iii. *A broad assessment of the requirement for additional retail floorspace;*

iv. *Strategic guidance on the location and scale of retail development;*

v. *Preparation of policies and action initiatives to encourage the improvement of town centres;*

vi. *Identification of criteria for the assessment of retail developments.*

1.11 Founded on other principles set out in the RPG and the strategic context of the Retail Planning Strategy for the GDA, the focus of the County Retail Strategy has been these six factors.

Retail Planning Strategy for the Greater Dublin Area

1.12 DTZ Pieda Consulting, in association with DTZ Sherry FitzGerald and Brian Meehan & Associates, was commissioned in May 2000 to prepare the Retail Planning Strategy for the GDA (GDA Retail Strategy). The report was published in November 2001. There is a commitment in the GDA Retail Strategy for it to be updated following the publication of Regional Planning Guidelines for the GDA. On this basis, it is anticipated that this process will commence later in 2004.

1.13 The GDA Retail Strategy is designed to ensure there is a sufficiency of retail floorspace to accord with population and expenditure growth and that, consistent with the RPG, it is located in an *'efficient, equitable and sustainable manner'*. Prior to summarising what the GDA Retail Strategy comprises and the context that it provides for the County Retail Strategy, it is important to highlight the scope of the GDA Retail Strategy. It is made clear in the GDA Retail Strategy's Executive Summary that:

> *'The Strategy will not however be an end in itself, its primary purpose is to inform the statutory planning process and in particular, to ensure that future Development Plans make adequate provision for retail development. To assist this, the Strategy is required to provide indicative advice on the scope for new development and how associated floorspace should be distributed.'*

1.14 In essence, the GDA Retail Strategy provided the baseline and the strategic principles to be taken through at the county level into detailed retail strategies. Of importance in the preparation of this Strategy are the following policy influences set down in the GDA Retail Strategy:

- *The protection of Dublin City Centre*
- *Strengthening the role of other centres, particularly "development centres" in the Hinterland Area and selected nodes in the Metropolitan Area*
- *The distribution of new retail floorspace to broadly reflect that of population growth, where market conditions allow*
- *The need to reduce the demand for travel and the consequential support for centres well served by local transport services across their catchment areas*
- *The desire to facilitate a competitive retail industry and to encourage retail innovation.*

1.15 Each of these policy influences has implications for both the GDA Retail Strategy and consequently the county retail strategies produced around the GDA. These are specifically identified as:

i. *The distribution of new floorspace should be linked to the existing and future retail hierarchy for the GDA, and should be appropriate in scale and character to the hierarchical role of the centre;*

ii. *Some forms of retailing may be inappropriate for a town centre location and, in the interests of enhancing choice, competition and innovation, they should be accommodated in locations offering good levels of accessibility by both private and public transport;*

iii. *The desire to protect the role of Dublin City Centre, specifically its high order comparison shopping role, implies that there will be limited opportunity for high order comparison retailing beyond Dublin City Centre;*

iv. *Linking the distribution of retailing and population is likely to be far more practical in the convenience, rather than the comparison sector. The latter tends to operate through a stricter hierarchy, with levels of service towards the upper end of the hierarchy being determined by levels of catchment population which are often not available in non-urban areas; and*

v. *It follows that whereas a principle can be expressed which favours the retention of high levels of locally generated expenditure, that principle will be easier to follow in the convenience sector than in the comparison sector.*

1.16 From these influences and principles, the GDA Retail Strategy identifies the following:

- The GDA retail hierarchy, specifically the upper levels

- Application of the regional hierarchy at a settlement level, again the emphasis is on upper level settlements
- The parameters for considering retail formats outside of the formal hierarchy
- The type of shopping appropriate to different levels in the hierarchy
- The need to target the retention of expenditure outflow as a means for reducing the need to travel and thus enabling more sustainable shopping patterns
- The principles underpinning the county retail strategies.

1.17 These were all given due consideration in the preparation of the adopted Strategy and are also inherent influences on the revised Strategy. It is however important to briefly summarise the key strands and principles defined for the county retail strategies:

i. The starting point is to assume that whilst expenditure available will increase across the GDA over the period of the GDA Retail Strategy, by virtue of growth in population and per capita spend per head, the net share will stay constant;

ii. The GDA Retail Strategy is dependent upon the accessibility improvements and demand management measures proposed in 'A Platform for Change' being delivered – where this is not possible, expenditure and turnover capacity will be freed up for redistribution around the GDA, primarily but not exclusively in the Metropolitan Area;

iii. The effectiveness of the GDA Retail Strategy will also depend on the provision of a level of car parking appropriate to the role of each shopping centre within the hierarchy;

iv. The retail strategies for each county are required to address the significant differences in the role and function of shopping centres throughout the GDA;

v. Dublin City Centre is the preferred centre for most higher order shopping and the county reports within the GDA Retail Strategy support this. This implies the assumption of continued high levels of outflow from the rest of the GDA to the City Centre in the consumption of higher order goods;

vi. The Metropolitan County parts of Dublin Region (Dun Laoghaire-Rathdown, Fingal and South Dublin) have close links to Dublin City Centre which will be strengthened by proposed improvements to public transport systems and the road network. Additionally, they provide a range of intervening shopping opportunities for the residents of the Hinterland Counties who would otherwise have to access Dublin City Centre for all higher order comparison retailing;

vii. Because of the emphasis on town centres, their redevelopment and expansion should be encouraged by offering some flexibility in the application of floorspace limits;

viii. There are indications of over-trading in the convenience sector and where it exists it represents a further reservoir of expansion potential;

ix. Shopping centre development can be a lengthy process bearing in mind the necessary timescales for design, land acquisition, the securing of the necessary authorisations and key lettings, plus construction and fitting out. The town centre environment is recognised as often presenting the most acute challenges that can further lengthen the development process. In such circumstances, it would be quite legitimate to take account of expenditure capacity beyond 2006 in considering the scope for emerging major development proposals;

x. The promotion of retail development will tend to take account of local circumstances including varying population and socio-economic characteristics, population growth rates and consumer spend estimates; and

xi. The existing level of retail warehousing provision consumes around 15% of comparison expenditure and this represents a reasonable planning target.

1.18 The GDA Retail Strategy provided the most comprehensive baseline information for the generation of the regional retail strategy and each of the county retail strategies. This information included:

- Population and expenditure forecasts to both 2006 and 2011.
- A comprehensive retail floorspace survey of all centres, groups of shops and retail warehouse parks in the GDA. It excludes standalone premises. This information is held on a geo-coded database by all the local authorities in the GDA.
- Some 3,750 household telephone interviews to ascertain the shopping patterns of residents in the GDA. The way that the information was gathered and collated has enabled the patterns to be discerned at county level.
- Street face-to-face interviews in 10 key centres in the GDA (and Drogheda in view of the influence/draw it has on shopping patterns in the north of the GDA). Some 4,250 interviews were undertaken. This provided information on the level of import of spend from people who were not residents of the GDA. This survey too was designed to provide information at a county level.
- An inventory of all extant planning permissions and pending applications. This enabled details of how much retail floorspace was in the pipeline to be taken into account in the quantification of capacity for further floorspace.

1.19 This information is publicly available in the following documents and provided the baseline for the adopted Strategy, with up dates as appropriate:

i. Consultation Report (May 2001);

ii. Retail Planning Strategy for the Greater Dublin Area (November 2001);

iii. Annex 2 to GDA Retail Strategy; and

iv. Working Papers 1-8, GDA Retail Strategy.

1.20 The baseline information for the GDA Retail Strategy had a freeze date of May 2001. Since that date, as has been highlighted, the final results of the 2002 Census of Population, the National Spatial Strategy and the Regional Planning Guidelines for the GDA have been published. In addition, within Fingal and the remainder of the GDA, a number of new retail schemes have been developed that will have had an influence on shopping patterns within both the Metropolitan and Hinterland Areas of the region. As a consequence, the baseline is no longer up to date and hence the requirement for it to be reviewed.

2002 Census of Population

1.21 The final results of the 2002 Census of Population were published in 2003. These have been incorporated in the review of the Strategy. The analysis of the results is provided in Section 2.

National Spatial Strategy

1.22 Following on from Government recommendations, as outlined under the National Development Plan (NDP), the National Spatial Strategy (NSS) was launched in November 2002 as a twenty-year strategy designed to achieve a better balance of social, economic, physical development and population growth between the regions. It aims to achieve and to sustain:

- a better quality of life for people;
- a strong, competitive economic position; and
- an environment of the highest quality.

1.23 The NSS states that in order to achieve more balanced regional development, a greater share of economic activity must take place outside the GDA. To achieve this, it sets out a framework for gateways, hubs and other urban and rural areas around the country to act together to promote balanced regional development. The Dublin and the Mid East Regions (the GDA) are considered jointly in the NSS because of their strong functional interrelationship and the fact that SPG for the two regions was already in place.

1.24 Whilst the NSS promotes a more sustainable and balanced distribution of population and development around the regions, the importance of enhancing the competitiveness of the GDA so that it continues to perform at the international level as a driver of national development is given much weight. The means to achieve this is identified as through physically consolidating the growth of the Metropolitan Area i.e. Dublin City and suburbs and, at the same time, by concentrating development in the Hinterland Area (area outside the Metropolitan Area) in strategically placed, strong and dynamic urban centres i.e. the Primary Development

Centres identified in the SPG. The NSS provides the framework for the Regional Planning Guidelines which are examined in the context of the Strategy below.

1.25 Of particular importance to the County Development Plan Review and consequently the Strategy is that, so far as is practicable, Section 9(6) of the Planning and Development Act 2000 requires development plans to be consistent with the NSS.

Regional Planning Guidelines for the Greater Dublin Area - *'Implementing the National Spatial Strategy'.*

1.26 In May 2003, the Minister directed the Dublin and Mid East Regional Authorities to develop new Regional Planning Guidelines for the GDA and other regions to prepare their first guidelines. The objective of the guidelines is to provide a long-term strategic planning framework for the development of the GDA for a period of 12 years and that they are reviewed after 6 years. Draft Regional Planning Guidelines were published in January 2004 and were the subject of public consultation. The final guidelines were published in July 2004.

1.27 The GDA Regional Planning Guidelines are fundamental to the review of the County Retail Strategy. This is because they provide the housing and population growth targets for the GDA's local authority areas, present a settlement hierarchy that is consistent with the NSS and the fact that Councils must have due regard to the guidelines as they are issued as Ministerial guidelines. As such, the emerging County Development Plan and County Retail Strategy have had to be reviewed against these guidelines. For consistency with the Regional Planning Guidelines, the population forecasts and capacity assessment presented in this Strategy extend to 2016.

1.28 Under the guidelines development within the Metropolitan Area will be consolidated, allowing for the accommodation of a greater population with a much enhanced integrated public transport system. This will require consolidation of the towns through an increase in overall residential development densities, particularly along public transport corridors. The Draft Regional Planning Guidelines proposed extending the Metropolitan Area within Fingal to incorporate Lusk and Rush as Moderate Growth Towns but, following submissions by the Council, the finalised guidelines did not change the boundary of the Metropolitan Area in Fingal.

1.29 The Regional Planning Guidelines propose that development of the Hinterland Area will be balanced by the concentration of development into identified towns, separated from each other by extensive areas of strategic green belt land protected for agriculture and similar uses. This will require the consolidation of designated towns and an increase in overall development densities. These towns (or adjacent sets of towns) will each have a high level of employment activity, high order shopping and a full range of social facilities. The guidelines promote that growth towns and villages must develop in a sustainable manner to their maximum extent and act as focal points for development of their rural catchments. It is anticipated that these towns will become self sufficient in the longer term but with good transportation links to Dublin City.

REVIEW OF STRATEGY

1.30 The review and update of the County Retail Strategy will be incorporated into the Review of the Fingal County Development Plan 2005-2011. Appendix A provides a Glossary of Terms used in the Strategy. Preparation of the review addressed the following:

- Ensuring that the six requirements set out under paragraph 36 of the RPG were met
- Updating of the quantitative and qualitative information of the GDA Retail Strategy at the County level.

1.31 The framework that was adopted to undertake this work is summarised below:

- **Stage 1:** Review & Assessment
- **Stage 2:** Option Appraisal
- **Stage 3:** Policy Review
- **Stage 4:** Strategy Formulation
- **Stage 5:** Reporting.

Stage 1: Review & Assessment

1.32 The study commenced with a **Workshop** with Council Officers. This meeting served to agree the framework for the work and the different components of the approach as inputs to the development plan process. It also enabled discussion and exploration of key issues arising from the 2003 Strategy and the vision for the County and its key settlements in the context of the Regional Planning Guidelines. The components and factors agreed are summarised below.

1.33 **Population Projections:** past population projections and the latest housing and population projections for the County were examined, taking due account of the results of the 2002 Census of Population. This included review of the projections presented in the Regional Planning Guidelines set against recent trends in population growth and housing completions in the County.

1.34 **Town Centre Health Checks:** it was agreed the health checks for seventeen centres in the County that were undertaken as part of the 2003 Strategy be reviewed and updated in order that any changes to the centres could be monitored. To ensure consistency, the format used in the adopted Strategy was applied. As part of the health checks, the **floorspace surveys** prepared as part of the GDA Retail Strategy were reviewed to enable changes in the intervening period to be tracked.

1.35 **Core Shopping Areas:** the core shopping areas for each of the main centres in the County Retail Hierarchy were re-examined to ensure that they remained appropriate in 2004.

1.36 **Broad Assessment of Additional Floorspace:** this was reappraised to incorporate updated population figures and projections, extant retail planning permissions that have been granted since the adopted Strategy was prepared and to take account of any changes in shopping patterns that had taken place in the interim.

1.37 **Household and Shopper Surveys:** since the GDA Retail Strategy baseline household and shopper surveys were undertaken, there have been a number of new retail schemes developed both within the County and the remainder of the GDA. As a result, it was anticipated that there would be important changes in shopping patterns that should be taken into account in the review of the Strategy. **MORI MRC** was commissioned to undertake **500** household and **1,000** shopper surveys. The shopper surveys were undertaken in: Blanchardstown Town Centre (**500**), both the shopping centre and retail parks; Swords (**375**) including the Main Street (**125**) and The Pavillions Shopping Centre (**250**); and, Airside Retail Park (**125**). To ensure consistency with the original surveys, the same questionnaire pro forma were used.

1.38 **Policy Review:** a review of all relevant new and emerging policy frameworks was undertaken and the Strategy examined in the context of each of these including the NSS and Regional Planning Guidelines. It also included review of the emerging County Development Plan's Urban Strategy and Hierarchy.

Stage 2: Option Appraisal

1.39 Following the Stage 1 workshop, the following were reviewed and examined:

i. The 2003 County Retail Strategy retail hierarchy;

ii. The Regional Planning Guidelines six tier hierarchy;

iii. The proposed County Urban Strategy and Hierarchy;

iv. Key settlements in Fingal in the context of retail potential and expenditure capacity in the GDA;

v. New applications and existing and potential public transportation and highways infrastructure;

vi. The health checks of each of the main centres in the County; and

vii. Retail trends and potential.

Stage 3: Policy Review

1.40 The RPG require that the policies and proposals emerging from county retail strategies are incorporated as variations to development plans. An important part of this process is the review of existing retail strategies/policies and proposals in current development plans in order to inform the detail of the variation that requires to be taken forward. This formed Stage 3 of the study.

Stage 4: Strategy Formulation

1.41 The previous stages of the work provide the foundations for the Strategy. From this, the work moved on to strategy formulation. This comprised:

- Reviewing the framework/foundations for the Strategy
- Confirmation of policies and proposals
- Definition of sites/areas for retail development with a broad indication of the scale and the timescales involved
- Identification of policies and initiatives to secure town centre and other centre enhancement.

The output of this stage formed the basis of the revised County Retail Strategy.

Stage 5: Reporting

1.42 A revised **Draft County Retail Strategy** was prepared and circulated as a **Working Document** to Council Officers. The Draft Strategy formed the basis of a **Study Workshop** with Council Officers. All agreed amendments to the report arising from the workshop have been incorporated into a second draft Strategy which will be circulated to Elected Members.

STRUCTURE OF REPORT

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

- **Section 2:** presents an updated summary of the baseline for the County Retail Strategy
- **Section 3:** provides the revised floorspace capacity assessment
- **Section 4:** reviews and assesses the retail hierarchy for the County and the role that key centres do and should play
- **Section 5:** summarises the key issues and considerations in relation to the main centres in the County, their potential for retail development and the implications for the County Retail Strategy
- **Section 6:** outlines the aims, strategic framework and policies and proposals of the County Retail Strategy.

2 BASELINE FOR THE STRATEGY

2.1 The key baseline information for the Strategy has been updated to incorporate new data, revised population forecasts and the results of the 2004 household and shopper surveys. Where appropriate, reference is made to the baseline presented in the GDA Retail Strategy and the 2003 adopted County Retail Strategy. The section is structured as follows:

i. Population Estimates and Forecasts;

ii. Retail Floorspace; and

iii. Shopping Patterns.

POPULATION ESTIMATES AND FORECASTS

2.2 The future distribution of retail floorspace in the County is influenced by trends in population growth and the location of the main centres in Fingal. In particular, expectations regarding the growth in population in the County anticipated over the next decade will be a major determinant of the future requirements for additional floorspace. In the paragraphs that follow, recent trends in population growth and the distribution of population are examined followed by a review of population projections to 2016.

Recent Trends in Population Growth

2.3 Growth in the population of Fingal in recent years has largely been driven by the country's economic boom, the expansion of population in the GDA and the role and location of the County within the Metropolitan Area. Increased employment opportunities within the GDA have resulted in high levels of inward migration to the Region. This, alongside rising house prices in and around Dublin City, has led to large increases in the population of areas on the periphery of the Dublin Metropolitan Area.

2.4 Based on the figures published in the 2002 Census of Population, the County had a population of 196,413 at 2002, which represented an increase of 28,730 or 17.1% from the last Census of Population in 1996. In the GDA, this growth rate was only surpassed in Meath (22.1%) and Kildare (21.4%). The increase in population in Fingal represented almost 10% of the total increase in population of the State and the County increased its share of the total population of the country from 4.6% in 1996 to 5.0% in 2002.

2.5 Population growth was well in excess of both the GDA and State averages. It is also important to highlight that Fingal outperformed all of the Metropolitan Area counties (including Dublin City) in respect of population growth. Table 2.1 illustrates Fingal's population growth between 1996 and 2002 and compares it with the performance of other areas of the GDA and the State as a whole.

Table 2.1
Population in the GDA

Centre/Area	1996	2002	Absolute Change	% Change
Fingal	**167,683**	**196,413**	**28,730**	**17.1**
Dublin City	481,854	495,781	13,927	2.9
South Dublin	218,728	238,835	20,107	9.2
Dun Laoghaire-Rathdown	189,999	191,792	1,793	0.9
Kildare	134,992	163,995	29,003	21.5
Meath	109,732	133,936	24,204	22.1
Wicklow	102,683	114,719	12,036	11.7
GDA	1,405,671	1,535,250	129,579	9.2
State	3,626,087	3,917,336	291,249	8.0
Source: 2002 Census of Population, CSO				

Distribution of Population

2.6 The population levels and the growth experienced by the main towns in the County between 1996 – 2002 are shown in Table 2.2. The four largest centres of Blanchardstown, Swords, Malahide and Balbriggan each had a population in excess of 10,000 in 2002, with Blanchardstown and Swords clearly being the major centres. Based on housing completions since the Census then the population of these towns will have further increased substantially. Compared to Balbriggan, which grew by 21.5% over the last intercensal period, Malahide's relative importance as a centre is seen to be diminishing, as reflected in the low 2.1% population growth in the town between 1996 and 2002. It is important to highlight that the combined population of the main towns accounts for over two thirds of the population of Fingal and for over 80% of the total increase in population between 1996 and 2002. This illustrates their strength and importance within the County's settlement hierarchy and strategy.

Table 2.2 Main Centres of Population in Fingal County				
	1996	**2002**	**Absolute Change**	**% Change**
Blanchardstown*	38,616	50,607	11,991	31.1
Swords	22,314	27,175	4,861	21.8
Malahide	13,539	13,826	287	2.1
Balbriggan including environs	8,473	10,294	1,821	21.5
Skerries	7,339	9,149	1,810	24.7
Portmarnock	9,145	8,376	(769)	-8.4
Rush	5,429	6,769	1,340	24.7
Donabate	1,868	3,854	1,986	106.3
Lusk	2,287	2,456	169	7.4
Total of All Main Centres	109,010	132,506	23,496	21.6
Remainder of County	58,673	63,907	5,234	8.9
County Total	**167,683**	**196,413**	**28,730**	**17.1**

Source: 2002 Census of Population, CSO
*Electoral Divisions 008 to 015

Recent County Level Population Forecasts

2.7 Population forecasts for Fingal were presented in the SPG, the 1999 Fingal County Development Plan and the 2001 Fingal County Housing Strategy, all of which used data from the 1996 Census of Population as the basis for their forecasts.

2.8 The Regional Planning Guidelines estimate a County population of 259,757 (Table 7.3) by 2010. This is derived from the "Low" scenario for the GDA's population growth. However, discussions with Council Officers indicate that this estimate should be considered to be the lower threshold of estimated population growth in the County. A number of factors underpin this assessment and these were highlighted to the consultants in the finalisation of the Regional Planning Guidelines. While the overall estimate for GDA population growth seems reasonable, its actual distribution around the GDA was questioned for the following reasons:

- The projections allocate increases to Dublin City, Dun Laoghaire-Rathdown and South Dublin that are unlikely to be achieved, based on past performance and future potential. A key issue is the shortage of housing land particularly within Dublin City and Dun Laoghaire-Rathdown.

- Fingal, along with Kildare and Meath, has the capacity and recent track record of achieving and exceeding housing and population targets. This is an issue that was also raised in submissions on the Draft Regional Planning Guidelines by Kildare, Meath and Wicklow. However, in respect of the three Hinterland Area counties, continued growth in their populations is not seen as sustainable or in accord with the objective of consolidation of the Metropolitan Area.

- Fingal's housing target in the Regional Planning Guidelines, which specifies a 44,996 increase between 2003 – 2010, does not reflect that 8,166 units have already been constructed since June 2002 and a further 21,273 have been granted planning permission, many of which are under construction. Therefore, at March 2004, approximately 65% of the County's target to 2010 had already been achieved.

- The Regional Planning Guidelines assume an average household size of 2.4 which is close to the European average. In Fingal, this is likely to underestimate household size given the higher proportion of young families that have located to the County.

2.9 In addition, Population and Migration Estimates issued by the CSO in September 2004, estimate that while the population growth of the entire GDA is closer to the 'LO' scenario presented in the guidelines, it is still exceeding the population growth projected under the 'LO' scenario.

2.10 Another factor highlighted in the Retail Planning Guidelines is the role and importance of Fingal within the GDA economy. By 2010 it is projected that the County will be the second most important employment area in the Region, overtaking both Dun Laoghaire-Rathdown and South Dublin in the jobs 'league'. The number of jobs located in Fingal is expected to increase by one third over this period.

2.11 For these reasons a higher population projection for the period is wholly justified and defensible.

Revised Population Forecasts

2.12 Population forecasts play an important role in the capacity assessment contained in Section 3. It uses the years 2004, 2006, 2011 and 2016 for estimating additional floorspace requirements and therefore population forecasts are required for each of these years. In estimating more realistic forecasts, reference has been made to the 2002 Census, the Regional Planning Guidelines and trends in housing completions/population growth. Table 2.3 presents the High and Low population scenarios from the Regional Planning Guidelines. The "High" growth scenario, which given recent trends and future potential, is a more appropriate basis for forecasting the County's population growth over the coming years and as such has been adopted in the revised County Retail Strategy.

Table 2.3
Population Projections for Fingal County

	2002	2004	2006	2011	2016
High Projection	196,413	213,019	231,030	275,987	298,199
Low Projection	196,413	210,630	225,876	262,026	273,670

Source: derived from 2002 Census of Population and the Regional Planning Guidelines for the GDA, Tables 7.2 and 7.3

2.13 The significant increases in population anticipated under the "High" growth scenario have wide ranging implications for the revised Strategy. The majority of the increase, consistent with the NSS and the Regional Planning Guidelines, will predominantly take place in the County's development centres. As a consequence of the growth, there will also be considerable increase in the expenditure available to support additional retail floorspace in centres across the County.

RETAIL FLOORSPACE

2.14 The original retail floorspace survey of the GDA was carried out by DTZ Sherry FitzGerald over a five month period in the latter half of 2000.[1] All towns and villages with a population greater than 1,000 were surveyed, although towns with a smaller populations were included if they were identified as growth centres in development plans. The survey did not include new retail developments that were under construction at the time of the survey. These were however accounted for as extant planning permissions. In preparing this review, all new developments that were trading at February 2004 are included with extant planning permissions identified separately. Table 2.4 presents a summary of the floorspace broken down by retail category for key settlements and the County as a whole.

[1]. Further information on the floorspace surveys is provided in Working Paper 4 of the GDA Retail Strategy.

Table 2.4
Composition of Retail Floorspace February 2004 (m^2)

Town/Townland	Total Area	Convenience	Comparison	Retail Warehousing	Trading Retail Floorspace	Vacant
Balbriggan	**7,369**	3,259	3,563	-	6,822	547
Blanchardstown Village	**3,353**	2,214	1,080	-	3,294	59
Blanchardstown	**60,281**	5,617	25,561	25,256	56,435	3,847
Castleknock	**969**	710	229	-	939	30
Corduff	**132**	54	-	-	54	78
Donabate	**1,174**	988	186	-	1,174	-
Howth	**1,366**	783	519	-	1,302	64
Lusk	**1,686**	496	50	1,140	1,686	-
Malahide	**6,184**	1,551	4,580	-	6,130	54
Portmarnock	**2,492**	1,951	441	-	2,392	100
Roselawn Shopping Centre	**2,884**	2,010	874	-	2,884	-
Rush	**1,536**	688	385	-	1,073	464
Skerries	**5,328**	2,764	2,114	-	4,878	451
Sutton	**2,576**	1,932	602	-	2,534	42
Baldoyle	**1,402**	230	247	-	477	925
Swords	**55,835**	7,339	24,960	22,553	54,852	983
Other Centres	**8,420**	2,222	390	3,142	5,754	2,666
Total	**162,986**	**34,808**	**65,779**	**52,091**	**152,678**	**10,309**

Source: based on Table 2.2 Fingal County Retail Strategy 2003

2.15 At May 2001, there was some 1.025 million m^2 of trading floorspace (excluding vacancies) in the seven counties that make up the GDA. Of the total floorspace, 19.6% was within Fingal which had the largest amount next to the City Centre (25.7%) in the GDA. This was largely attributable to the scale and importance of Blanchardstown Shopping Centre. The other Metropolitan Area counties – the remainder of Dublin City, Dun Laoghaire-Rathdown and South Dublin accounted for 13.9%, 12.2% and 10.9% of the total floorspace respectively.

2.16 The County performed well against the remainder of the Metropolitan Area in respect of its share of convenience floorspace (13.9%) compared to 13.6% Dublin City Centre, 21.2% in the rest of the City, 13.3% Dun Laoghaire-Rathdown and 16.2% South Dublin. Fingal (23.5%) outperformed all but the City Centre (33.5%) in terms of comparison floorspace with the Rest of the City, Dun Laoghaire-Rathdown and South Dublin having 8.5%, 9.6% and 8.2% respectively of the total. This excluded bulky goods/retail warehousing for which, with the exception of South Dublin (9.2%), there was a relatively even distribution of bulky goods retailing outside of the City Centre (which had 26.2% of the total) with 18.6% in Fingal, 15.7% in the Rest of the City and 16.5% in Dun Laoghaire-Rathdown.

2.17 The strength of Fingal can be directly attributed to Blanchardstown, Swords and the development of Airside Retail Park. However, at the time of this research, while there is a considerable quantum of floorspace in the pipeline there is much coming through in other parts of the Metropolitan Area. However, it is not just the quantum of floorspace that requires to be examined but the type and order (low, middle and high) of the floorspace.

2.18 Table 2.4 indicates that there was some 152,678m^2 of trading floorspace in the County at February 2004, excluding vacant floorspace. This comprises of the order of 22.8% convenience, 43.1% comparison and 34.1% retail warehousing. This split has changed little since the adoption of the 2003 Strategy. The large majority of the trading floorspace (36.9%) is located in Blanchardstown Shopping Centre/Retail Parks and Swords (35.9%). Currently, each of these centres rate as providing some of the most modern floorspace in the GDA and benefit from a high proportion of national and international multiples.

2.19 At February 2004, there was some 40,294m^2 of retail floorspace with full planning permission in the County. This is nearly 25% of the floorspace that is currently trading in Fingal and therefore represents a significant increase. Key developments in the pipeline are the Red Mall and additional retail warehousing units in Blanchardstown and the expansion of Airside Retail Park at Swords. The Red Mall will be anchored by Marks and Spencer which is an important boost as the County was the only local authority area in the Metropolitan Area that either did not have one or one on the way. If the County is to sustain its competitive position then it needs to ensure it attracts further higher order comparison floorspace, particularly department stores and international multiples.

2.20 In the course of the health checks that were undertaken of the main centres, the 2001 floorspace survey was reviewed in order that any changes in the composition of the main centres in the County could be identified. An important feature has been the changes in the occupiers over the period since the floorspace surveys were undertaken. Whilst the health checks did not involve any quantitative measurement of floorspace, they did enable a comparative analysis of vacancy levels. With the exception of Swords Town Centre, on the whole the vacancy levels across the County have remained low illustrating in general the health and vitality of the different centres. The Swords' figures were skewed as they incorporated the centre formerly anchored by the Superquinn which relocated to The Pavilions. This is almost wholly vacant but has a planning consent for a mixed use scheme which incorporates retail floorspace. We understand that the scheme will be anchored by Penneys. The higher level of vacancy in Swords that currently prevails should thus be taken to be a temporary issue.

SHOPPING PATTERNS

2.21 Household and shopper surveys were initially undertaken as part of the GDA Retail Strategy and the findings were incorporated into the 2003 Strategy. Some **415** households in Fingal were surveyed by telephone interview and a total of **782** shopper face to face interviews were carried out in Blanchardstown Shopping Centre (**523**) and Swords Town Centre (**259**). The surveys were undertaken between September 2000 and February 2001 on both weekdays and at weekends. It should be noted that they were conducted prior to the opening of The Pavilions and Airside Retail Park.

2.22 Because a number of major retail developments have been completed both within and outside the County since the GDA surveys, it was considered necessary to update the household and shopper survey information. The new surveys were undertaken by **MORI MRC**, one of the leading market research companies in the country. A total of **500** household telephone interviews were undertaken covering the whole County and some **1,010** shopper surveys in the two key retail centres, Blanchardstown and Swords. Surveys in Blanchardstown were undertaken at the Town Centre precinct (**342**) and associated retail parks (**165**) while those in Swords were undertaken in the Swords Town Centre (**100**), The Pavilions (**252**) and Airside Retail Park (**151**). Surveys were undertaken over February and March 2004 on both weekdays and weekends.

2.23 The objective of the surveys was to identify current shopping patterns in the GDA and County respectively. The surveys play an important role in the capacity assessment by informing the estimates of **market share** (the proportion of retail expenditure by persons living in Fingal spent and retained in the County) and **trade draw** (the proportion of turnover in retail outlets in Fingal attributable to persons living outside the County). Below we summarise the key findings from the 2004 household and shopper surveys, followed by a comparative analysis with those from the 2000/2001 surveys.

Household Survey Key Findings

2.24 The following are some of the key findings from the household survey:

Main Food Shopping

- Swords is the principle destination for those undertaking a main food shopping trip with almost half (48%) of all respondents travelling to one of five stores in the town.
- National multiples in The Pavilions, namely Dunnes Stores and Superquinn, attract over one-quarter (28%) of all main food shoppers.
- Symbol group stores such as SuperValu, Spar and Centra etc. attract less than 10% of main food shoppers while discount stores, primarily Lidl, attract a further 6% of main food shopping trips.

- Approximately 15% of respondents travel outside the County for their main food shopping, with Dunnes Stores in Donaghmede and Superquinn, Lucan being the most popular destinations.
- Just 2% of household respondents shopped at the major convenience stores (Dunnes, Superquinn and Lidl) in Blanchardstown
- 79% of respondents drive themselves in a car or van for a main food shopping trip which is carried out once a week by nearly two-thirds (65%) of respondents.
- On average, respondents spent €122 on a main food shopping trip. The median response was €120.

Top-Up Shopping

- A wide range of destinations are visited for top-up shopping with Dunnes Stores in Portmarnock being one of the most popular attracting approximately 7% of total top-up shopping trips.
- Some nine of the top ten top-up shopping trips are to a symbol group or local store.
- The majority (79%) of respondents undertake a top-up shopping trip at least twice a week with 25% top-up shopping at least once a day.
- Although the principle mode of transport for top-up shopping is the car, 41% of respondents stated that they walk for their top-up shop.
- On average, respondents spent €15 on a top-up shopping trip. The median response was €22.

Bulky Goods Shopping

- Over one-third (36%) of respondents chose a destination in Swords for their bulky goods shopping with the Airside Retail Park accounting for one-quarter of all bulky goods shopping trips.
- Primary destinations for bulky goods shopping outside of the County include Power City in Coolock (7%) and a further 3% travelling to Arnotts in Dublin City Centre.
- Killane's Furniture in Lusk and Worrells in Malahide attract approximately 5% of all bulky goods shopping trips.
- Three-quarters of all respondents drove on their last bulky goods shopping trip while a further 15% were a passenger in a car or van.

Clothing and Footwear Shopping

- The proximity of Dublin City Centre to the County proves a major draw for clothes and footwear shopping. Some 38% of all respondents travel to stores in Dublin City Centre for clothes and footwear shopping.
- The Pavilions in Swords is the most important destination for clothes and footwear shopping in the County with over one-third (35%) of all respondents shopping there.
- A further 13% of respondents undertake their clothing and footwear shopping within the County, 12% at Blanchardstown and 1% in Malahide.
- Other notable destinations for fashions goods outside the County include Liffey Valley Shopping Centre (5%) and the Santry Omni Park and Donaghmede Shopping Centres (< 3%).

General Comments

- Approximately 40% of all respondents visit a centre in the County at least once a week while a further 14% will visit once every two weeks.
- One-third of respondents stated that better access by car was the single most important improvement required in the County's centres.
- Almost one fifth (18%) of respondents stated that more fashion shops and better provision of larger stores is required within the principal centres in the County.

Key Findings from Shopper Survey

The key questions posed by the shopper surveys related to the following topics:

- Shopper origin
- Reason for visiting the shopping location
- Actual/expected expenditure on goods or services
- Main stores visited
- Mode of transport
- Frequency of visits to each shopping location
- Principle attractions of the particular destination
- Principle improvements that might be made to the shopping location.

2.25 Detailed analysis of the shopper surveys are presented in Appendix B. Below, the more important findings are provided.

Shopper Origin

- 93% of shoppers whose origin is known originated from within the GDA
- Of the shoppers surveyed in Blanchardstown and Swords:
    - 53.7% were Fingal residents
    - 17.9% were Dublin City residents
    - 9.1% were Meath residents
    - 2.5% were South Dublin residents
    - 2.5% were Louth residents
    - 1.7% were Kildare residents
    - 1.0% were residents of Dun Laoghaire-Rathdown
- In general there was a higher proportion of people from within Fingal visiting Swords (62%) than Blanchardstown (45.6%)
- Grocery and clothes shopping are the main reasons for visiting the shopping locations surveyed

Actual/Expected Expenditure on Goods or Services

- Table 2.5 summarises the trade draw of Fingal shopping centres for convenience and comparison and other goods
- Non-residents of Fingal account for nearly 70% of expenditure in Blanchardstown Retail Park
- Fingal residents account for 73.2% and 70.2% of expenditure along Swords Main Street and The Pavilions respectively
- Fingal residents account for approximately 70% of all convenience spend
- Fingal residents account for the majority of expenditure on services
- In terms of comparison expenditure, non-residents account for a greater proportion of expenditure (55.2%) than residents of the County

Table 2.5
Total Shopper Spend (%)

Origin	Convenience (Main Food)	Comparison (Clothing)	Other (Cinema/ Hairdresser etc.)	Total
Fingal Residents	68.8%	44.8%	62.9%	52.3%
Non-Residents	31.2%	55.2%	37.1%	47.7%

Modal Split

- Although 8 modes of transport were used by respondents, 98.3% of all trips were made by either private motor car, walking or by bus
- The private motorcar is the principle mode of transport accounting for approximately 73% of journeys made by respondents
- For Blanchardstown and Airside retail parks, 83% and 90.7% of respondents respectively use the car and 6.1% and 1.3% respectively use the bus
- In contrast, the respondents on Swords Main Street had much lower car dependence than the other locations, choosing instead to either walk (40%) or take public transport (40%).

Comparison with 2000/2001 GDA Retail Strategy Survey Results

2.26 An important output of the recent surveys is the information that they provide in respect of the changes in shopping patterns over the intervening years since the GDA Strategy surveys were conducted. We compare the results of the 2004 surveys with those found in 2000/2001 as presented in Working Paper 6 of the GDA Retail Strategy. We highlight our key findings and conclusions below.

Household Surveys

Shopping Patterns

- The original 2000/2001 surveys found that County Fingal had a market share of 92% for convenience shopping. From the more recent household survey, it is estimated that market share has fallen to 86.6%. Supermarkets across the County boundary in Dublin City (Donaghmede, Coolock, Finglas) and South County Dublin (Lucan) account for the bulk of this leakage. Increased car use indicated for main food shopping might be a factor that explains this increased leakage as out-of County locations become relatively more accessible to car owners.

- In 2000/2001, it was estimated that 49% of comparison expenditure was leaking out of the County. At that time a large amount (52%) of clothing and footwear expenditure was leaking to Dublin City Council areas. It is now estimated that the market share for comparison goods has increased to just under 80%. While Dublin City Centre is still an important comparison shopping destination for Fingal residents, the strengthening retail offer of Swords and Blanchardstown has allowed the County to claw back expenditure from Dublin City Centre.

- With respect to bulky goods, in 2000/2001 locations in Dublin City Council areas accounted for an estimated 30% of the bulky goods expenditure of Fingal residents. Now the retail parks in Swords are the more favoured bulky goods shopping destinations and have diverted trade from Dublin City Centre locations, which account for just over 10% of bulky goods purchasing by Fingal residents.

Mode of Transport

- In 2001, approximately 83% of all the County's respondents travelled by car for their main food shopping while a further 15% walked to their main food shopping destination. The 2004 survey has revealed that those travelling by car has increased to 90% while those walking has declined to 8%.

- The percentage of those travelling by car for top-up shopping purposes has risen from approximately 48% in 2001 to 52% in 2004. The proportion of respondents walking to undertake top-up shopping remains relatively unchanged.

- Approximately 88% of all respondents in 2004 stated that they travelled (driver or passenger) by car on their last bulky goods shopping trip. This compares with 80% who used the car on their last bulky goods shopping trip in 2000/2001.

- The mode of transport for clothing and footwear shopping has altered little in the intervening period, with the biggest change being travel by train falling from 12% in 2000/2001 to 8% in 2004.

Frequency of Shopping Trips

- The percentage of those undertaking a main food shopping trip once a week has fallen from 75% in 2000/2001 to 65% in 2004. Those now choosing to do their main food shopping once a fortnight has grown from 5% to 11%.

- There have been limited changes in top-up shopping patterns with 25% of respondents travelling to undertake their top-up shopping everyday and approximately 21% doing their top-up shopping twice a week. Over one-third of respondents do top-up shopping between 3-5 times a week.

- The frequency of clothing and footwear shopping trips has changed relatively little with 31% respondents travelling once a month for clothing and footwear in 2000/2001 and the corresponding figure being 28% in 2004. Weekly clothing and footwear shoppers are still relatively rare with just 15% of respondents shopping once week or more for clothing and footwear in 2004 which is similar to that in the previous survey (16%).

Shopper Surveys

- The key implication of the shopper survey is that the trade draw of County Fingal has increased from 3% to 19.2% for convenience goods and from 35% to 47.8% for comparison goods between the time of the GDA Strategy shopper surveys in 2000/2001 and the Spring of 2004.

- In respect of Blanchardstown, there were strong similarities in both the GDA survey and the recent one. In both surveys, approximately 54% of shoppers came from outside the County. In 2000/2001, the largest proportion of these was from Dublin City (19%) and Meath (13%) which is similar to 2004 where 17.3% of shoppers were found to originate from Dublin City and 12.0% from Meath.

- The picture with Swords is more complex as it is not a comparison of like with like given that the 2000/2001 survey only related to Swords Main Street as it was prior to the opening of The Pavillions and Airside Retail Park.

- Looking at just Swords Main Street, there has been a reduction in the numbers of County residents shopping there – a decline from 82% to 60%. However, this reduction can be accounted for by the fact that more residents are diverting to The Pavillions, particularly given the relocation of Superquinn from the Main Street. Work related shopping was a feature of both the surveys.

- In the 2000/2001 survey, Swords Main Street was characterised as serving a relatively local catchment population. Since then, Swords Main Street has increased its trade draw from 14% to 26.8% of total expenditure. This probably attributable to shoppers frequenting The Pavilions and linked trips occurring between it and Swords Main Street. With respect to The Pavillions and Airside Retail Park, 34% and 33% of shoppers respectively were found to be from outside the County.

- The more recent household and shopper surveys confirm that The Pavillions and Airside Retail Park are an important factor in explaining the improved competitiveness of the County's retail sector with national/international operators better meeting the needs of Fingal residents and attracting shoppers from outside the County.

- There were strong similarities between the two surveys in terms of modal split. Swords Main Street continues to attract a high proportion of walk-in shoppers and visitors (40% of those interviewed, as compared with 35% in 2000/2001), while in Blanchardstown Shopping Centre, shoppers continued to rely heavily on the private motorcar.

- Some divergence was found between expenditure figures for Blanchardstown Shopping Centre, which in 2000/2001 was found to draw 60% of its spend from outside of Fingal. The proportion of non-resident spend has now diminished somewhat, representing 47.9% of spend, although while significant, is over 10% less than previously. In breaking this down further, we can see that 69% of non-food spend and 48% of food spend originated from outside of Fingal in 2001, while currently it is just 40.4% of food shopping and 55.5% of clothing/household shopping.

- 85% of people visited Swords Main Street once a week or more in 2000/2001, rising to 89% in 2004. This increased frequency of shopping trips was repeated in Blanchardstown Shopping Centre where 69% of visitors visited once a week or more compared to just 72% in 2000/2001.

Key Conclusions

2.27 An estimated **86.6%** of convenience expenditure by the resident population is spent in retail outlets located in Fingal. This is a reduction from the **92%** reported in the GDA Retail Strategy at 2001. The decline in the County's share of its convenience expenditure potential indicates that there are issues in respect of the quantum and quality of Fingal's convenience offer resulting in residents having to travel increasingly to centres in adjoining local authority areas to meet these needs. In essence, the County is failing to meet the needs of its rapidly expanding population and is an issue that requires to be redressed in the revised County Retail Strategy.

2.28 In contrast, the County has witnessed a substantial increase in its retention of comparison shopping expenditure. The County's market share in 2001 was **49%** which was high when set against the other counties surrounding Dublin City Centre. Based on the household survey, the County's share has significantly increased to **79.3%** founded on the improvements to the quality, quantum and attraction of its new floorspace in the intervening period.

2.29 There have also been important changes in the County's attraction to shoppers from outside of Fingal since the GDA Strategy surveys. The derived convenience expenditure trade draw in the GDA Retail Strategy was **3%**. The recent surveys indicate that this has risen to some **19.2%** which can be largely attributed to the strength and draw of The Pavillions which has modern format Dunnes Stores and Superquinn supermarkets and the propensity for linked convenience and comparison shopping trips. There has also been a substantial increase in comparison expenditure trade draw in the intervening period with this increasing for the County overall from **35%** to **47.8%**. Critical to this is a combination of factors with the most important being:

i. The attraction of The Pavillions Shopping Centre and Airside Retail Park;

ii. The continued importance of Blanchardstown in regional and national shopping patterns; and

iii. The relative failure of the rest of the GDA as a whole to deliver the quantum and quality of comparison floorspace required to meet the needs of its ever expanding and affluent population.

2.30 Both the household and shopper surveys have found an increase in the use of the private motor car for shopping purposes. For example, car borne shopping by Fingal residents has increased from:

- 83% to 90% for main food shopping
- From 80% to 88% for bulky goods shopping.

2.31 Similarly the shopper survey found car trips for patrons of Blanchardstown increasing from 70% to 70.5% at the Blanchardstown Shopping Centre and 83% at Blanchardstown Retail Park. This is not unique to the County and we have found this to be the case in other parts of the country.

2.32 Increased car ownership and usage coupled with improving transportation linkages and disposable incomes may explain why there are simultaneous increases in spend leakage and trade draw. Across the GDA, people are travelling further to meet their shopping needs. This has implications for transportation as well as retail planning policy.