

Economic & Retail Study 2018 – Belmayne & Clongriffin

Prepared on behalf of Dublin City Council



Quality information

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Executive Summary

1.0 Introduction

This Economic and Retail Study for the Clongriffin-Belmayne area of north Dublin has been prepared by AECOM Ltd, in conjunction with Braniff Associates. It was commissioned by Dublin City Council in order to obtain an independent, evidence-based understanding of the economic and retail potential of the area.

The Study is intended to inform the implementation of the Local Area Plan (LAP) for Clongriffin-Belmayne and to specifically aid the formulation of a Masterplan for undeveloped Key District Centre (KDC) lands at Belmayne/Belcamp Lane. These Study lands are mainly Council owned and are located at the junction of the Malahide Road (R107) and M50 / M1 Link / Grange Road (R139).

Figure 1.0: Study lands at Belmayne and Belcamp Lane



Importantly, the floorspace findings of this Study are advisory in nature and are not intended to serve as prescriptive floorspace caps to limit economic and retail development in the LAP area.

2.0 Economic and retail uses

The economic uses considered in this Study can be collectively termed service uses. They include retail services, leisure services and financial and professional services. They are described below, together with the retail uses.

Retail uses

Retail uses are commonly defined as convenience goods and comparison goods. Convenience goods are mainly groceries and other consumable commodities that are purchased regularly and usually locally. Comparison goods are durable items for which customers are prepared to travel some distance in order to compare prices and quality. They include clothes, footwear, household durables (both bulky and non-bulky) and leisure goods.

Retail services

Retail services refer to businesses whose primary trade is the retailing of a service and/or hiring of goods. This category includes hairdressing and personal care outlets, dry cleaners, travel agents, repair shops, post offices, opticians and clothes hire shops.

Leisure services

Leisure service uses are very much service and activity based and largely refer to the following:

- Restaurants/cafes/fast food takeaways – eating out
- Public houses/bars/clubs – socialising with a drink
- Betting offices, gaming centres, bingo – partaking in a game of chance

Places of entertainment such as cinemas, theatres and concert halls, as well as places of recreation such as gyms, leisure centres and swimming venues are also categorized as leisure services.

Financial and professional services

Financial and professional services include professional offices, bank branches, building society branches, solicitor's offices, auctioneers, etc. They typically form part of the profile of shopping/commercial areas and have own-door premises that interact with and provide a service to the public.

3.0 The approach to the Study

The above uses are characteristic of the non-residential land use profile of a District Centre. The capacity to develop these uses in Clongriffin-Belmayne Key District Centre is quantified on the basis of a retail supply and demand analysis, and comparative analysis with the scale of service uses found in other District Centres. The level of economic floorspace linked to the projected labour force in the area (i.e. employment density) is also examined.

The proportional breakdown of projected future economic and retail floorspace requirements in Clongriffin-Belmayne is then estimated on the basis of the average mix of uses observed in other town centres and district centres.

Office development that does not provide a direct service to the public and which does not actively engage with the public at street level does not form part of the floorspace projections in this Study. These offices are usually larger in size, more back-room in profile and less reliant on the need for commercial visibility. The market for these types of offices, which is most keenly linked to foreign direct investment, is examined in Section 5.0 of this Study.

4.0 The LAP catchment

The capacity for additional economic and retail floorspace is assessed on the basis of the population in the LAP area, together with the population in adjacent areas in Fingal County Council that is likely to visit the Key District Centre (KDC) because it is the nearest one to them. A KDC constitutes the top tier of an urban centre beyond the City Centre and is a level above a District Centre, in terms of facilitating population and employment growth.

The LAP population is considered the primary catchment for economic and retail floorspace need projections, while the population of the adjacent Fingal lands constitutes a secondary catchment. Consideration of both catchments allows for the distillation of a range of low and high floorspace projections. In 2016 the overall population of both catchments totalled 13,565 persons and it is forecast to grow to 33,775 persons by the year 2027.

5.0 Key findings & recommendations of study

Based on the key findings of a household survey, stakeholder engagement workshop, statistical assessment and comparative analysis with town centres and other District Centres, a number of key recommendations were formulated. These estimate how much economic and retail floorspace could be developed and where this should be located.

Reference to Table 1 indicates that there is a total of 45,104 gross sqm of existing retail and economic floorspace in the LAP, a figure which is inclusive of the Clarehall Shopping Centre site (22,167 gross sqm). Approximately a third of this existing floorspace is vacant (15,571 gross sqm) - all of which is located north of the M50 / M1 Link / Grange Road (R139) and outside the Clarehall shopping centre site. The latter includes both the Tesco anchored Shopping Centre and adjoining units on the former Fitness First site.

Notwithstanding this high rate of vacancy the significant level of residential growth planned for this area implies that there will be an additional requirement for development of between 12,184 gross sqm and 22,358 gross sqm of economic and retail space by the year 2027 (Table 1).

Table 1

Requirement for additional economic and retail floorspace (Gross sqm) in LAP relative to existing and vacant floorspace		
	Gross sqm	
Existing occupied floorspace in LAP (less Clarehall Shopping Centre site)	7,366	
Existing occupied floorspace in Clarehall Shopping Centre Site	22,167	
Vacant floorspace in LAP	15,571	
Total	45,104	
Requirement for additional floorspace 2027 (Gross sqm)*	Low 12,184	High 22,358

* Note: The projected floorspace is in addition to vacant and permitted (extant) floorspace

The estimated mix of retail and economic uses that will comprise this additional floorspace is listed in **net sqm** in Table 2. It can be seen that leisure service uses, which include, inter alia, premises for eating out and socialising with a drink account for the largest percentage of the floorspace requirement (5,169-9,111 net sqm).

There is also potential to develop another supermarket in the area under the category of convenience goods retailing (868-1,290 net sqm). Its development should be facilitated in the northeast quadrant of the Belmayne Key District Centre as a counterbalance to the vacant and permitted supermarkets at Clongriffin KDC and as a catalyst for wider development at the new town square conceived for this location.

Table 2

Mix of Economic and Retail floorspace requirement 2027		
	Low forecast Net sqm	High forecast Net sqm
Convenience goods retailing	868	1,290
Comparison goods retailing	722	1,976
Retail Service	601	1,117
Leisure Service	5,169	9,111
Financial and professional service	1,168	2,156
Total	8,529	15,650
Total gross sqm* estimated on basis of 70:30 net to gross split	12,184	22,358

* Note: The projected floorspace is in addition to vacant and permitted (extant) floorspace

The proposed allocation of this floorspace across the LAP area is illustrated in Figure 2. Understandably, nearly all of the floorspace is allocated to the two urban nodes that comprise the zoned Key District Centre (KDC) land at Belmayne and Clongriffin. Over half the projected floorspace (56%) is targeted for the Belmayne Town Centre Site, which is the area earmarked for the development of a new Town Square. The balance of floorspace is apportioned to Clongriffin KDC (26%), Belcamp Lane in the southwest

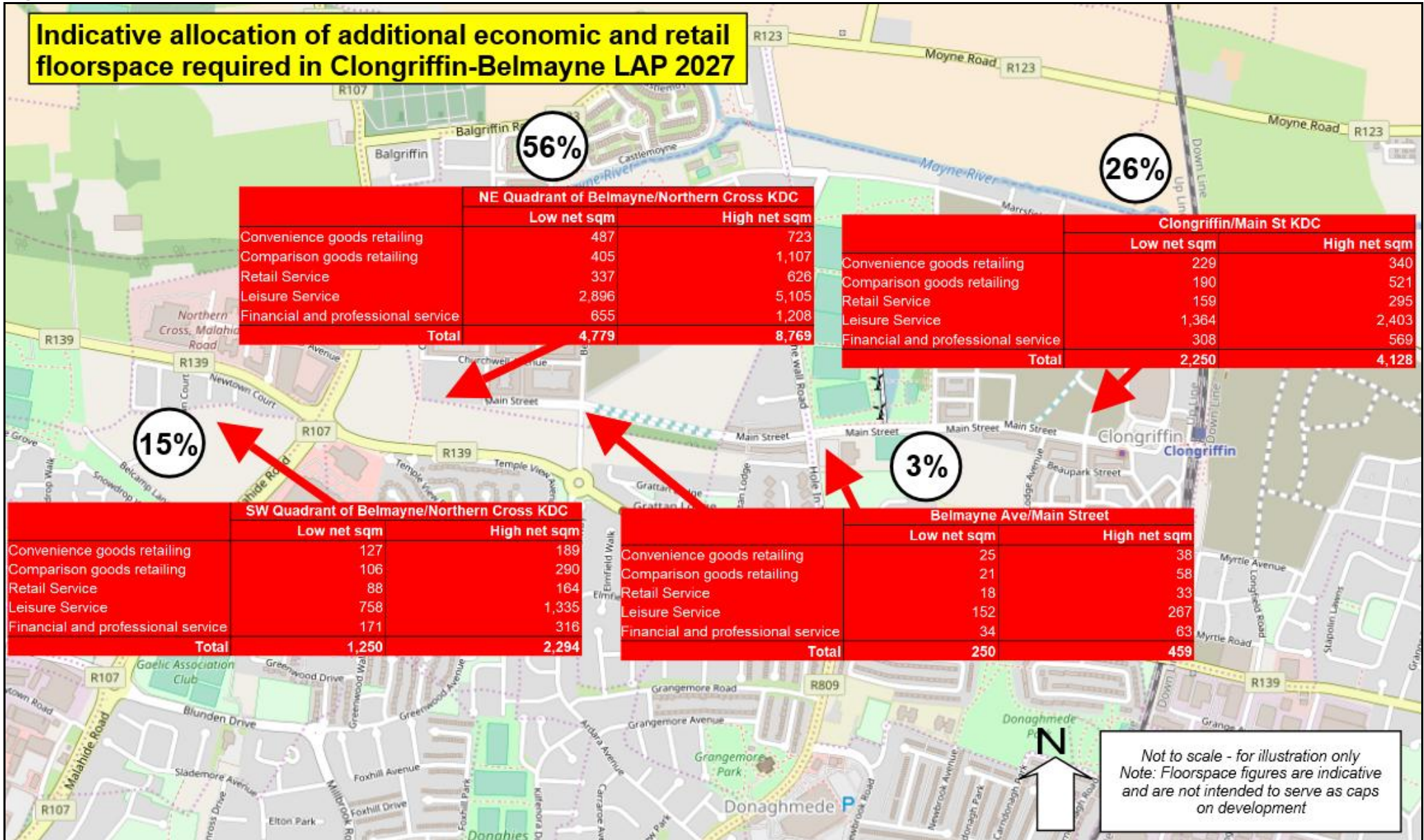
quadrant of Belmayne KDC (15%) and the junctions of Main Street with Belmayne Avenue and the Hole in the Wall Road (3%). The proposed distribution of new floorspace has regard to a combination of factors, including: the existing pattern and footprint of development; occupancy rates; and preliminary Masterplan proposals.

6.0 Conclusion

It is important to reiterate that the proposed distribution of uses in this Study is not a rigid prescription of floorspace requirements across the LAP and is not intended to serve as a cap on economic and retail development. Rather the findings of the Study should be viewed as broad guidance for the development of mainly Council owned land at Belmayne KDC.

While it is recognised that economic conditions and market interest will ultimately determine how much economic and retail floorspace will be built in the Clongriffin-Belmayne area in the coming years this Study is intended to assist the Council in planning for such development.

Figure 2



Abstract geometric lines in black on a white background, forming a complex, overlapping pattern of triangles and quadrilaterals.

Introduction

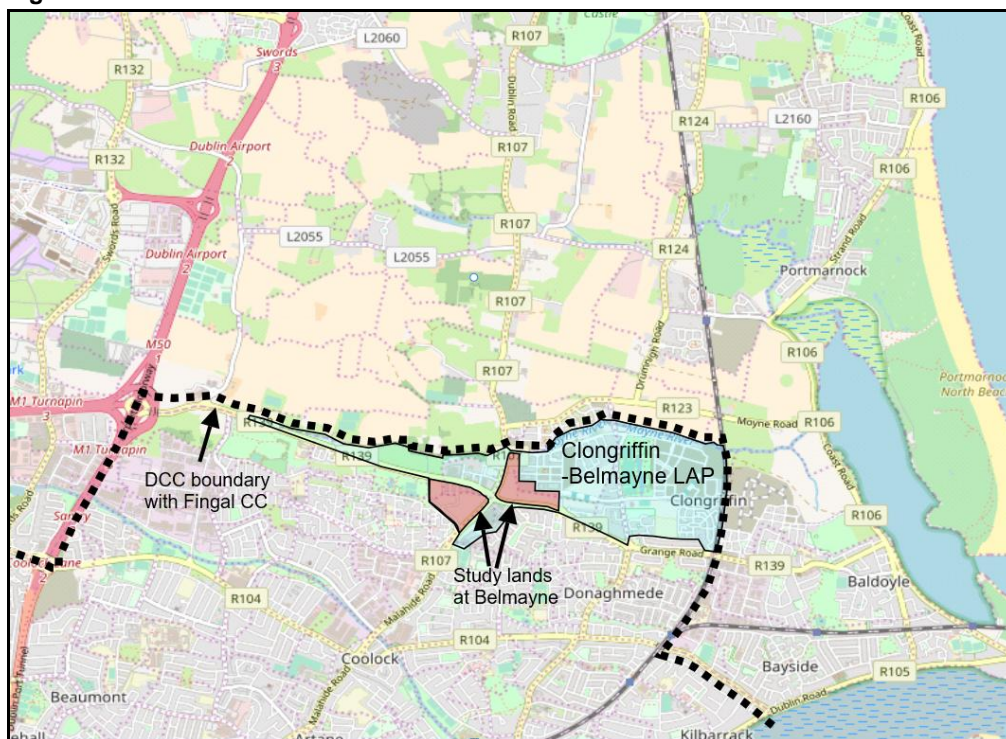
01

1.0 Introduction

1.0 Preface

This Economic and Retail Study for the Clongriffin-Belmayne area of north Dublin has been prepared by AECOM Ltd, in conjunction with Braniff Associates. It was commissioned by Dublin City Council (DCC) in order to obtain an independent, evidence-based understanding of the economic and retail potential of the area. The information is intended to inform the implementation of the Local Area Plan for Clongriffin-Belmayne and to specifically aid the formulation of a Masterplan for undeveloped lands at the Belmayne/Northern Cross junction of the Malahide Road R107 and M50/M1 Link/Grange Road R139 (Figure 1.0).

Figure 1.0



1.1 Scope of Study - Terms of reference

The specific items listed in the Council's terms of reference for the preparation of the Study are briefly described below:

- Planning policy analysis
- Review of existing and permitted uses in the area

- Succinct analysis of 2016 Census findings against 2011 results in LAP
- Assessment of the appropriate quantum of retail and economic provision in the area
- Identification of barriers and opportunities to development
- Market analysis of appropriate uses for the area
- Advice on specific creation of Key District Centre (KDC) lands at Belmayne
- Recommendations on how to integrate development at Belmayne KDC
- Recommendations on location of future development and phasing strategies

A key element of the study was to provide a realistic assessment of its retail and economic potential in the context of the area's designation as a Key District Centre within the Dublin City Development Plan 2016-2022.

Reporting arrangements involved consultations with the steering group, which mainly consisted of Council staff from the forward planning and City Valuer's Departments, and the Central Area Management Team.

1.2 Approach to Study

The Study examines the types of economic and retail uses that are characteristic of the non-residential land use profile of a District Centre. The economic uses considered in this Study can be collectively termed service uses. They include retail services, leisure services, and financial and professional services. Retail uses can be categorised as shops selling either convenience goods or comparison goods. A detailed definition of economic and retail uses is outlined in Sections 3.1 and 3.2.

The capacity to develop these uses in Clongriffin-Belmayne Key District Centre is quantified on the basis of a retail supply and demand analysis, and comparative analysis with the scale of service uses found in other District Centres. The level of economic floorspace linked to the projected labour force in the area (i.e. employment density) is also examined.

The proportional breakdown of future economic and retail floorspace requirements in Clongriffin-Belmayne is then estimated on the basis of the average mix of uses observed in other town centres and district centres. This information is available from the retail analytical firm GOAD Experian and largely exists for ground-floor uses only.

1.3 Structure of report

Within the context of the above, the Economic and Retail Study essentially consists of four parts, which are briefly outlined below.

- The first part outlines the planning background to the Study and provides a functional and socio-economic profile of the area, including population projections for the area (Sections 2 and 3).
- The second part details the key strands of research and analysis undertaken to inform the Study. These include: feedback from a stakeholder consultation workshop; findings of a household survey; and market analysis (Sections 4 and 5).
- The third part assesses the capacity for retail and economic development in the area (Sections 6 and 7).
- The final part of the Study considers the economic and retail potential of the area in the light of existing, vacant and permitted floorspace and outlines strategic recommendations for the Study lands at Belmayne KDC. These are aimed at assisting with forward planning in the area (Section 8).



Planning Background

02

2.0 Planning Background

2.0 Introduction

In order to gain an appreciation of the statutory and non-statutory policy background to the Economic and Retail Study a range of documentation and information was consulted. This included the following:

- Project Ireland 2040 - National Planning Framework
- Dublin City Development Plan 2016-2022
- North Fringe Action Area Plan 2000
- Clongriffin-Belmayne Local Area Plan 2012-2018 (extended to 2022)
- Fingal County Development Plan 2017-2023
- Baldoyle-Stapolin Local Area Plan 2013-2019
- Regional Planning Guidelines for the Greater Dublin Area 2010-2022
- Retail Strategy for the Greater Dublin Area 2008-2016
- Retail Planning Guidelines and Retail Design Manual 2012
- Transport Strategy for the Greater Dublin Area 2016-2035
- Fingal/North Dublin Transport Study 2015: Stage 2 Appraisal Report

A brief commentary is now provided on each of the above.

2.1 Project Ireland 2040 - National Planning Framework

With its focus on promoting balanced, sustainable growth across the island Clongriffin is specifically referred to in the National Planning Framework as one of the key future growth enablers for Dublin City and the Metropolitan Area:

*“Progressing the sustainable development of new greenfield areas for housing, especially those on public transport corridors, such as Adamstown, Cherrywood, Clonburris and **Clongriffin**,”* (p37, National Planning Framework)

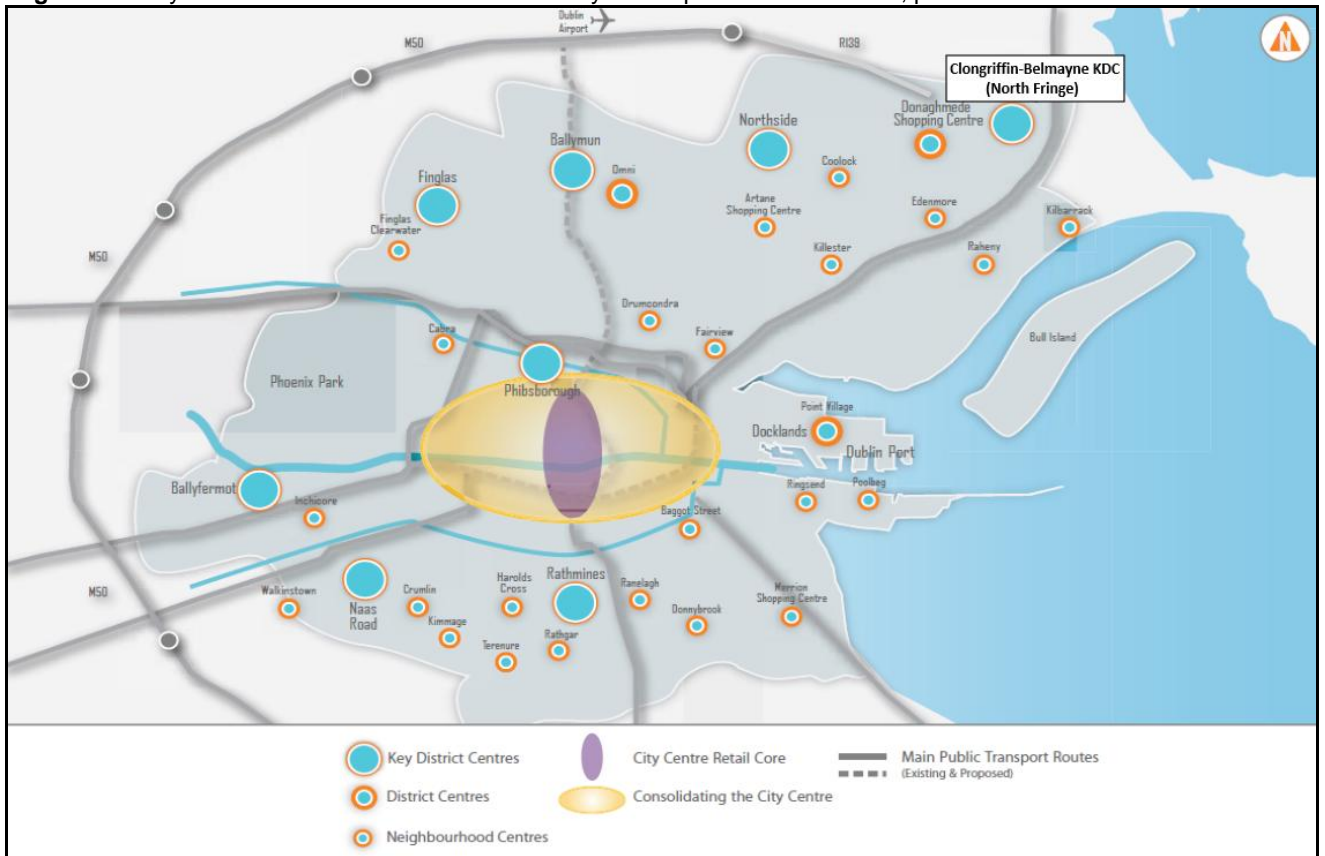
The National Planning Framework espouses a holistic approach to planning in order to ensure that residential and employment development is adequately served by transport, infrastructure and amenities. The preparation of this Economic and Retail Study can be acknowledged as one component of the holistic approach taken by Dublin City Council in implementing the Clongriffin-Belmayne Local Area Plan.

2.2 Dublin City Development Plan 2016-2022

It is necessary to highlight the key elements of the Dublin City Development Plan 2016-2022 as they relate to Clongriffin and Belmayne.

The Development Plan identifies the areas of Clongriffin Train Station and Malahide Road junction as the respective parts of the North Fringe East and West Key District Centre (KDC), otherwise known as Clongriffin-Belmayne KDC. This KDC constitutes 1 of 8 Key District Centres (KDC) in Dublin City (see Plan map extract in Figure 2.0). Other KDCs in north Dublin include Northside, Ballymun, Finglas Village and Phibsborough.

Figure 2.0: Key District Centres identified in Dublin City Development Plan 2016-22, p110

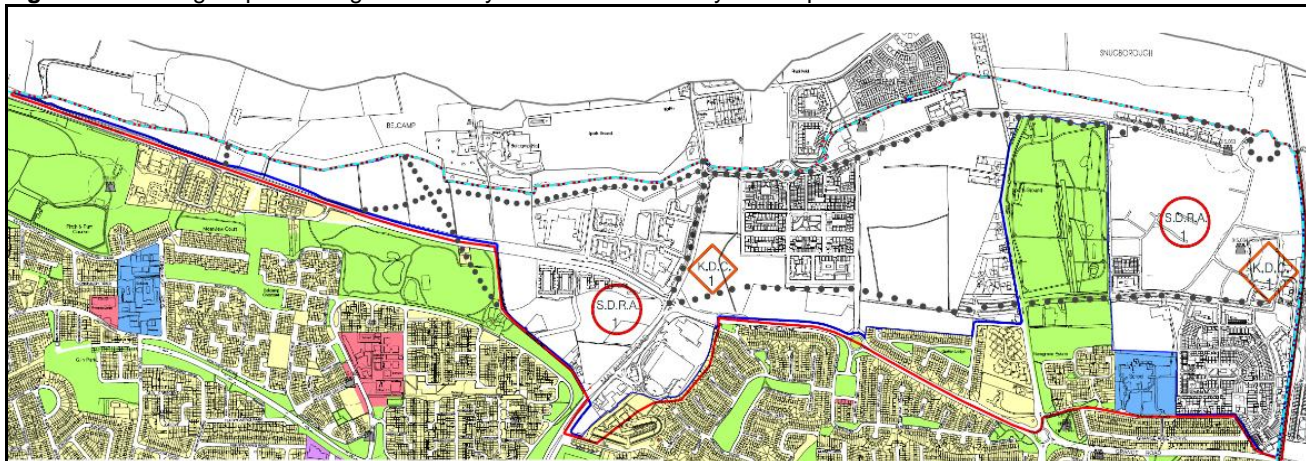


KDCs are designated as focal locations for the concentration of services within a particular area. They typically accommodate retail, office, community, cultural, public and leisure/entertainment functions for the local residential population. In order to encourage investment in KDCs the City Development Plan offers considerable flexibility in the type and scale of uses permissible. For example, the floorspace cap on office size does not apply.

Figure 2.1 indicates that the Clongriffin-Belmayne LAP area is also zoned as a Strategic Development and Regeneration Area – namely SDRA1 North Fringe (Clongriffin–Belmayne). The overriding objective of its designation as a SDRA is to promote residential and employment development. The Development Plan records that 3,400 homes have been built, together with 41,000 sqm of commercial floor place. It also points to the potential to eventually develop in the region of 8,000 homes in the area.

The Retail Strategy in the Development Plan points to a retail floorspace requirement of 40,000 sqm for Clongriffin/Belmayne.¹

Figure 2.1: Zoning map for Clongriffin-Belmayne area in Dublin City Development Plan 2016-2022



- Zone Z1 To protect, provide and improve residential amenities
- Zone Z9 To preserve, provide and improve recreational amenity and open space and green networks
- Zone Z14 To seek the social, economic and physical development and/or rejuvenation of an area with mixed use of which residential and "Z6" would be the predominant uses
- Zone Z15 To protect and provide for institutional and community uses
- Key District Centres
- SEVESO II establishments
- Strategic Development & Regeneration Areas
- LAP (Local Area Plan) & SDZ (Special Development Zone)
- Dublin Airport Outer Public Safety Zone
- ROADS**
- Road Schemes and Bridges

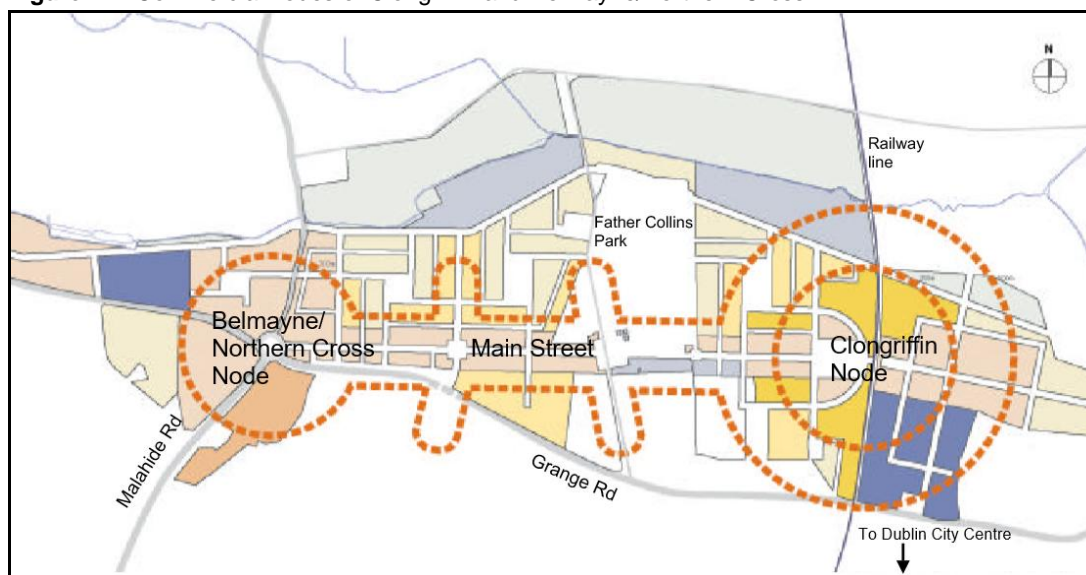
¹ Retail Strategy, Appendix 3, Dublin City Development Plan 2016-2022, Volume 2, p130

2.3 North Fringe Action Area Plan 2000

The North Fringe Action Area Plan 2000 was the forerunner of the Local Area Plan (LAP) for the area. It conceived a land use and urban design strategy for the area that centred on a boulevard axis (Main Street) linking two commercial nodes at the Malahide Road junction (Belmayne/Northern Cross) and Clongriffin Train Station (Figure 2.2).

Approximately 3,400 residential units and 41,000sq.m of mixed commercial, retail and hotel floorspace were developed under this Action Area Plan. Development also included Father Collins Park (26 ha), a new train station and significant urban infrastructure.

Figure 2.2: Commercial nodes of Clongriffin and Belmayne/Northern Cross

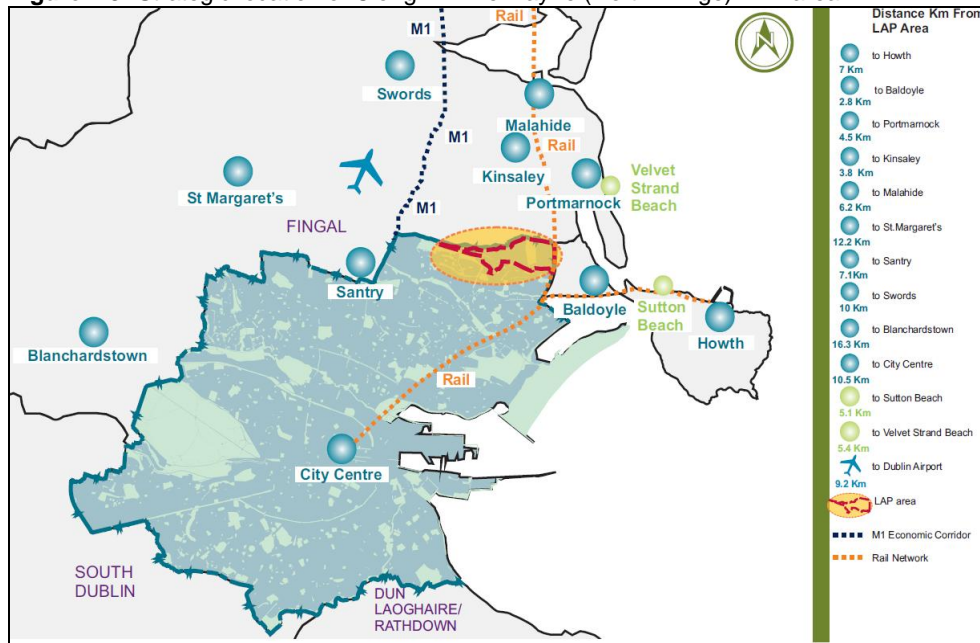


2.4 Clongriffin-Belmayne Local Area Plan 2012-2018 (extended to 2022)

The Clongriffin-Belmayne Local Area Plan (LAP) 2012-2018 was adopted in December 2012 and was extended for a further five years in November 2017.

The Clongriffin-Belmayne LAP is a development plan for large-scale urban expansion in this part of Dublin (Figure 2.3). Due to its strategic location on an Intercity rail route and Quality Bus Corridor, the Council's vision is to facilitate the development of a highly sustainable, mixed-use neighbourhood, with a distinct urban identity based around high quality public transport nodes.

Figure 2.3: Strategic location of Clongriffin-Belmayne (North Fringe) LAP area



Source: Figure 2.1 of Clongriffin-Belmayne LAP

When the LAP was adopted, development in this area had stalled and the country had yet to emerge from recession. The lack of development resulted in real challenges for the area in terms of incomplete road/pedestrian/cycle infrastructure. This gave rise to the separation of communities and unfinished service, community and social infrastructure.

The City Council has been approved Local Infrastructure Housing Activation Funding (LIHAF) for the completion of the 'Main Street'. The design of the remaining sections of this route is currently underway by consultants commissioned by the City Council.

This substantive LAP outlines the development strategy and objectives for the area, and provides specific guidance for the development in the northeastern and southwestern quadrants of Belmayne KDC (Figure 2.4). These lands are referred to in the LAP as the Belmayne Town Centre site and Belcamp Lane site. Notably, the LAP points to the possibility of creating a bypass at this junction and developing a new Town Square.

Figure 2.4: Aerial view of Belmayne KDC

Source: Figure 8.1 of Clongriffin-Belmayne LAP

The LAP indicates that a masterplan is to be prepared for the Belmayne Town Centre and Belcamp Lane sites (Figure 2.4). A key objective of the masterplan is to outline the mix of residential, commercial, community and other uses considered suitable for these mainly Council-owned sites. The masterplan is currently being prepared by the City Council. Key elements of the proposed masterplan are to include an overall block layout, which allows for important linkages both within the masterplan site and with neighbouring sites, most of which have been built-out or are being developed.

The Economic and Retail Study is intended to advise the City Council on how much retail and commercial floorspace is feasible at Belmayne KDC. One of the key considerations that it must take into account is the amount of non-residential floorspace that has already been built, much of which is vacant.

2.5 Fingal County Development Plan 2017-2023

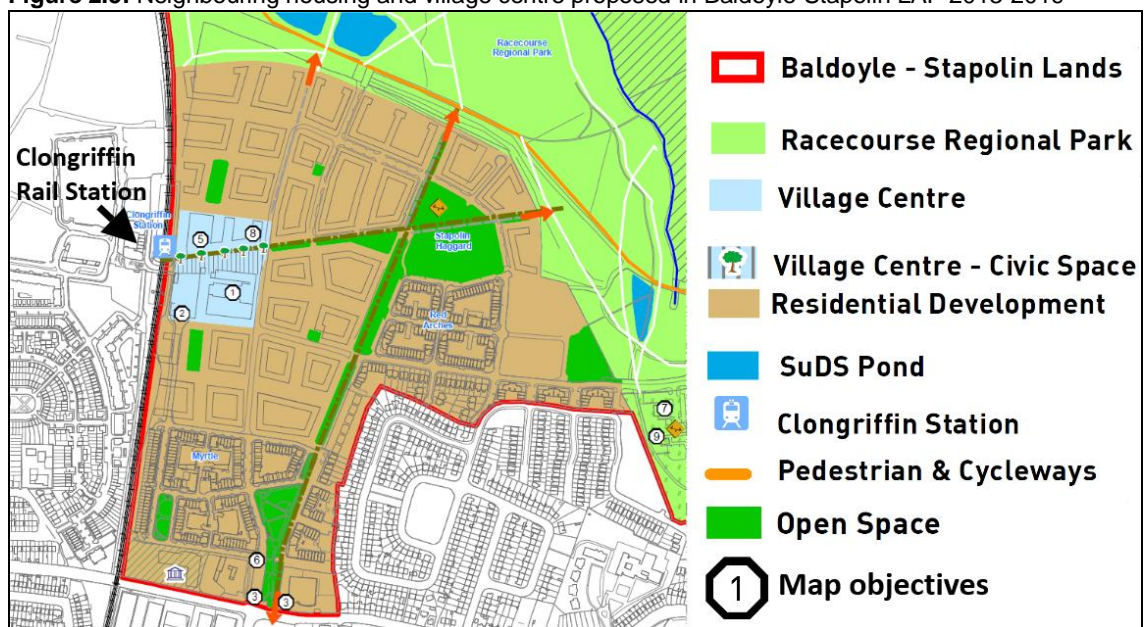
The Clongriffin-Belmayne LAP borders Fingal County Council and it is therefore necessary to briefly review the relevant contents of the Fingal County Development Plan 2017-2023. It zones substantial parcels of land located northwest of Belmayne at Belcamp for residential development and Belcamp is to be the subject of its own LAP in the coming years. It also designates the land east of Clongriffin Railway station for residential use and makes provision for a village centre. Indeed, this location east of the rail line is the subject of the Baldoyle-Stapolin LAP 2013-2019, which is considered below. The existing and projected populations in these locations are considered further in Section 3.0 of this Study.

2.6 Baldoyle-Stapolin Local Area Plan 2013-2019

The Baldoyle–Stapolin LAP identifies a new residential area and village centre directly east of Clongriffin rail station. The LAP notes that the “*proposed pedestrian, cycle and bus routes through the village centre, linking over the railway line with Clongriffin-Belmayne to the west, will be an important connection with that growing community and its new facilities.*”

For this reason it is considered prudent to include the residential population of this developing area as part of the projections for this Study. This is also justified on the basis that the permitted commercial floorspace in the proposed village centre, east of the rail line (shaded light blue in Figure 2.5) only amounts to 1,585sqm.

Figure 2.5: Neighbouring housing and village centre proposed in Baldoyle-Stapolin LAP 2013-2019



Source: Zoning map extract from Baldoyle-Stapolin LAP 2013-2019

The Baldoyle-Stapolin LAP provides the statutory framework for the development of the last remaining undeveloped residential land bank within the Baldoyle area. When completed, it is envisaged that some 1500 to 2000 new homes will be provided here.

2.7 Regional Planning Guidelines for the Greater Dublin Area 2010-2022

Prepared in June 2010 the Regional Planning Guidelines (RPGs) for the GDA have a particular relevance for the LAP area in terms of explaining the context for the emergence of high density development at this fringe location.

The regional guidelines build upon some of the core development principles enshrined in The National Spatial Strategy 2002-2020. These include the concentration of development in locations which allow for the integration of land use and public transport, and opportunities for high density mixed use development at public transport nodes like railway stations.² This is evident from the extract below.

² National Spatial Strategy 2002-2020, p103

*“The Metropolitan area, by containing both the built up footprint and key towns, contains large areas of lands at the fringes of the City and such towns. **The policy emphasis for the Metropolitan area is to gain maximum benefit from existing assets – public transport, social, infrastructural - through the continuation of consolidation and increasing densities within the exiting built footprint of the City, suburbs and Consolidation & Large Growth towns.** This is particularly important as falling occupancy levels are reducing population across the metropolitan area. **Future expansion of the existing built footprint though zoning for housing or mixed uses within the Metropolitan area should only happen in tandem with planned, committed development of high quality heavy or light rail based public transport projects and within carefully considered phased, high standard, integrated local area plans or Strategic Development Zones where new housing and public transport and other services are delivered in tandem.** During the life of these RPGs the expansion of the built up area shall only take place to support the delivery of Transport 21 public transport service investments.” p93, NSS*

The emphasis on high density development linked to the establishment of Clongriffin Train station in 2010 should be appreciated in the light of the above regional policy.

2.8 Retail Strategy for the Greater Dublin Area 2008 – 2016

Under the Retail Strategy for the Greater Dublin Area (GDA) there is no mention of Clongriffin-Belmayne, This is understandable as development in this area was in its infancy when the Retail Strategy was being prepared. Other Key District Centres in north Dublin, including Northside, Ballymun and Finglas are categorised as Level 3 Centres, together with Donaghmede Shopping Centre.

As with the national Retail Planning Guidelines the Retail Strategy for the GDA refers to the 10,000 population figure for designation of a Level 3 Centre, which is the tier of hierarchy associated with District Centres. It also refers to a maximum floorspace guidance figure of 20,000 sqm of net retail provision in a District Centre, with potential to extend this in high density locations³ which presumably would apply to the Clongriffin-Belmayne area.

“As part of the review of the 2001 Retail Strategy it was proposed that consideration be given to the sub-division of the Level 3 tier into two further sub-categories to reflect the different functions and size of the centres. This was not included as it could over complicate and restrict the development of centres unnecessarily. However, for a certain limited number of district/sub-county town centres within Level 3, located or proposed for areas of extensive and intense high density development providing for new towns/areas of over 10,000 population, the guideline of a maximum of 20,000 sq m net of retail provision can be extended by 10-15,000 sq m of lettable floor space to reflect the dense urban character of the development and the high population located within a short walking distance of the centre- where the area is not already served by an existing centre. Clear justification will need to be included in any City/County retail strategy outlining the case to support such a designation.” Para 6.11, Retail Strategy for the Greater Dublin Area 2008-2016

The retail floorspace figure of 20,000 net sqm originates from the superseded Retail Planning Guidelines for Planning Authorities, January 2005.⁴

As set out in the Retail Strategy for the GDA, these figures should serve as guideline thresholds for the appropriate size of district centres in the relevant statutory development or local area plan.

³ Paragraph 6.11, Retail Strategy for the Greater Dublin Area 2008-2016

⁴ Paragraph 71, Retail Planning Guidelines for Planning Authorities, January 2005

The Retail Strategy for the GDA also outlines the broad retail floorspace projections for Dublin City Council up to year 2016 (Table 2.1).

Table 2.1: Retail floorspace Projections for Dublin City up to 2016 in GDA Retail Strategy

Types of goods	Gross lettable sqm*	Net sqm#
Convenience goods	38,586 – 46,303	27,010 – 32,412
Comparison goods	181,256 – 296,601	126,879 – 207,621

*excludes mall/ circulation space

estimated on basis of 70% of area being net sales space

Source: Tables 5.7, 5.8, 5.9 and 5.0 of the GDA Retail Strategy 2008 - 2016

Based upon the observed level of construction to have taken place during the period 2008-2016 it is fair to assert that the majority of the projected floorspace, especially in respect of comparison goods shopping, was never built.

2.9 Retail Planning Guidelines 2012

The retail dimension to this Economic and Retail Study is consistent with the emphasis in the national Retail Planning Guidelines 2012 for “evidence-based” retail planning. Section 3.3 of the Guidelines details the minimum requirements of retail strategies within City and County Development Plans. While these minimum requirements may not strictly apply to Local Area Plans they do offer a framework for the preparation of the retail element of this study. At a minimum, City and County Development Plans must include:

- *the elements of their settlement hierarchy*
- *the level and form of retailing activity appropriate;*
- *the boundaries of the core shopping areas;*
- *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;*
- *strategic guidance on the location and scale of retail development, including where appropriate identifying opportunity sites which are suitable and available and which match the future retailing needs of the area;*
- *Identification of sites which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area;*
- *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; and*
 - *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*
- *relevant development management criteria for the assessment of retail developments.*

The Retail Planning Guidelines 2012 state that the broad assessment for additional retail floorspace only applies to those City and County plans for areas covered by a joint or multi-authority retail strategy, in this case the Greater Dublin Area (GDA). This notwithstanding, it is necessary to consider the capacity for additional retail floorspace in the LAP area given that it helps inform the capacity for related economic uses at this location.

The Retail Planning Guidelines 2012 do not provide guidance on the appropriate size for a District Centre, in terms of the required level of retail and commercial floorspace that is suitable. They mention in Section 2.2.4 that District Centres are usually a feature of an area containing 10,000 people or more.

Section 3.4 of the Retail Planning Guidelines explains that District Centres are suitable for a mix of uses and should not function simply as shopping locations in their own right:

*“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.”* (Section 3.4, Retail Planning Guidelines 2012)

Moreover, the Guidelines stipulate that the significant extension of a District Centre should be premised on significant population growth or a demonstrable level of under-provision of retail space:

*“The need for additional retail development in particular district centres to serve future population growth or for **any significant extension to an existing district centre should** be identified in the development plan and **be based on a significant growth in population in the intended location or on a demonstrable level of under-provision of retailing or other services** to meet the regular convenience and lower order comparison shopping needs of new communities as provided for and quantified by the relevant core strategy.”* (Section 3.4, Retail Planning Guidelines 2012)

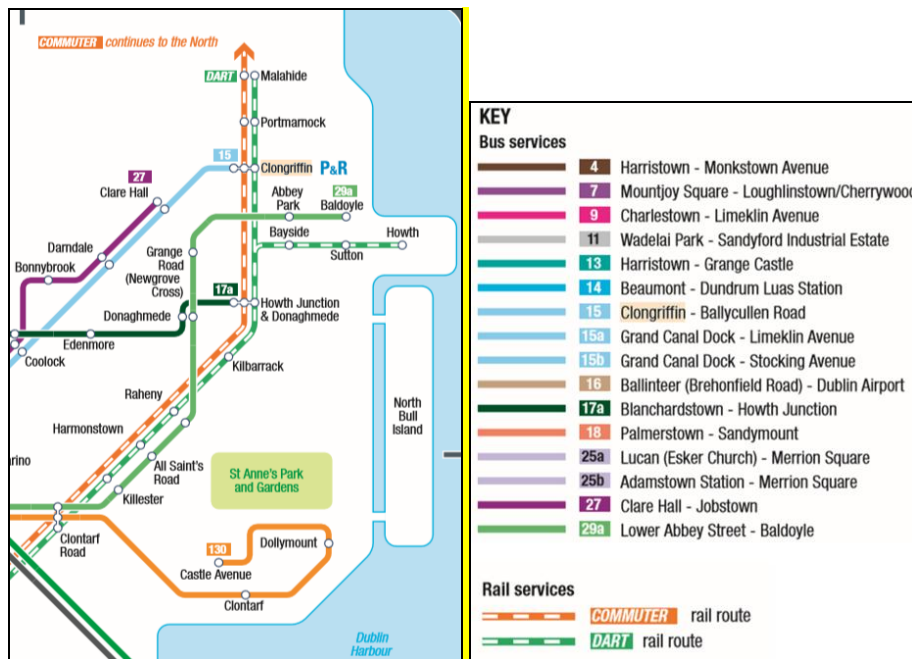
Significant population growth is envisaged for the Clongriffin/Belmayne area (see Section 3.7 later) and, understandably, this Study seeks to assess the implications of this growth for capacity to increase retail and economic uses in this Key District Centre.

2.10 The National Transport Authority’s Transport Strategy for the Greater Dublin Area 2016-2035

The Transport Strategy for the GDA notes that a second Bus Rapid Transit (BRT) line along the Malahide Road to Clongriffin will be provided as a means of upgrading the existing bus corridor to provide for additional demand not readily served by DART at locations such as Donnycarney, Artane, Coolock and Darndale.

The Transport Strategy also signals an intention to develop two cross-city schemes along routes forming part of the Core Bus Network. One of these is Clongriffin to Tallaght and the other is Blanchardstown to UCD. In June 2018, the NTA published the Core Bus Connects Project report. This discussion document

Figure 2.6: Bus and rail services available in area



Source: Figure 3.1, Dublin Frequent Transport Services Map, Transport Strategy for GDA 2016-2035

outlines draft proposals to significantly improve bus journey times and cycling priority along 16 radial core bus corridors. The City Centre to Clongriffin is one such route identified. Detailed proposals for each of the 16 corridors are expected to be published in October 2018, at which stage a full public consultation process will commence.

2.11 Fingal/North Dublin Transport Study 2015: Stage 2 Appraisal Report

This report states that the use of the train for commuting in areas located close to the railway line has reached a 30% share of all modal trips. When evaluating transport options the report notes that by the year 2033 1,700 passengers per peak am hour could use the Clongriffin service. In reaching its recommendation to pursue the Optimized Metro North transport option for the City the Fingal/North Dublin Transport Study discounted other options relating to Clongriffin, including the extension of the railway line to the airport and onwards to Swords.

Separately, a cross-boundary transportation study has commenced, involving Dublin City Council, Fingal County Council, the National Transport Authority and Transport Infrastructure Ireland. This study by Systra is commissioned by Fingal County Council to progress the development of new roads infrastructure/public transport requirements as they pertain to DCC’s North Fringe area and the South Fingal area.

2.12 Conclusion

Having regard to the foregoing it is evident that there is a range of planning and transport documentation at the national, regional and local level which has an influence on the development of this area. This is particularly the case given its interface location with Fingal County Council and the requirement to consider the contents of neighbouring Development Plans and joint transportation studies. Work is ongoing in respect of preparing the Transportation Study for the South Fingal/North Dublin area by Systra, as commissioned by Fingal County Council. Added to this, work has commenced by DCC on the masterplan for Belmayne and Belcamp Lane. The findings of this Economic and Retail Study are intended to feed into this Masterplan.



Profile of area

03

3.0 Location Profile

3.0 Introduction

This section of the Retail and Economic Study examines the profile of the general location of the subject lands that are the focus of this Study. It considers the profile of the wider Study area and Local Area Plan, in terms of their: role and function; land use character; demography; and socio-economic characteristics. It is assisted in this research by the availability of 2016 census data and by Council research into planning permissions in the area.

At the outset, however, it is necessary to define the main categories of retail and economic uses that are the focus of this Study.

3.1 Retail categories

When seeking to review the existing retail environment it is first necessary to appreciate how shops are categorised. According to the Retail Planning Guidelines 2012 shops are classified as outlets selling either (i) convenience goods or (ii) comparison goods.

(i) Convenience goods are mainly groceries and other consumable commodities that are generally purchased regularly and usually locally. They include food, drinks, tobacco, newspapers, magazines, cleaning materials and toiletries. Shopping for convenience goods is often simply referred to as food shopping.

The regularity of convenience shopping trips and the nature of the merchandise sold (especially chilled/frozen foods) dictate that shoppers for convenience goods normally undertake short trips to purchase such items.

(ii) Comparison goods are durable items for which customers are prepared to travel some distance in order to compare prices and quality. They include clothes, footwear, household durables and leisure goods. They are generally purchased in large retail centres and shopping trips for these goods generally take longer.

Bulky goods shopping is a subset of comparison goods shopping and refers to shopping for those comparison goods which are difficult to accommodate in town centres because of their space requirements for large showrooms, parking and servicing. They include items such as DIY goods, furniture, carpets and electrical/white goods and are typically sold from retail warehouses.

Comparison goods shopping, including bulky goods shopping, is often simply referred to as non-food shopping.

3.2 Economic categories

A key focus of this Study is to advise on the quantum of both retail and related economic space in this Key District Centre. These economic uses can be collectively termed service uses and are also referred to as employment and commercial uses. For the purposes of this Study the following categories are considered.

Retail services

Retail services refer to businesses whose primary trade is the retailing of a service and/or hiring of goods. This category includes hairdressing and personal care outlets, dry cleaners, travel agents, repair shops, post offices and opticians. Under Article 5(1) of the Planning and Development Regulations 2001 (as amended) retail services are also considered shops but are distinct from convenience and comparison shops in that they primarily sell a service as opposed to goods.

Leisure services

Leisure service uses are very much service and activity based and largely refer to the following:

- Restaurants/cafes/fast food takeaways – eating out
- Public houses/bars/clubs – socialising with a drink
- Betting offices, gaming centres, bingo – partaking in a game of chance

Places of entertainment such as cinemas, theatres and concert halls, as well as places of recreation such as gyms, leisure centres and swimming venues are also categorized as leisure services.

Financial and professional services

Financial and professional services include professional offices, bank branches, building society branches, solicitor's offices, auctioneers, etc. They typically form part of the profile of shopping/commercial areas and have own-door premises that interact with and provide a service to the public.

Office development that does not provide a direct service to the public and which does not actively engage with the public at street level does not form part of the floorspace projections in this Study. These offices are usually larger in size, more back-room in character and less reliant on the need for commercial visibility. The market for these types of offices, which is most keenly linked to foreign direct investment, is examined in Section 5.0.

3.3 The Study lands

The chief aim of this Economic and Retail Study is to advise on the scale and mix of economic and retail uses for mainly Council-owned lands at Belmayne/Belcamp Lane. The LAP refers to these undeveloped lands as the Belcamp Lane site and the Belmayne Town Centre site (Figure 3.1).

Figure 3.1: Study lands at Belmayne and Belcamp Lane

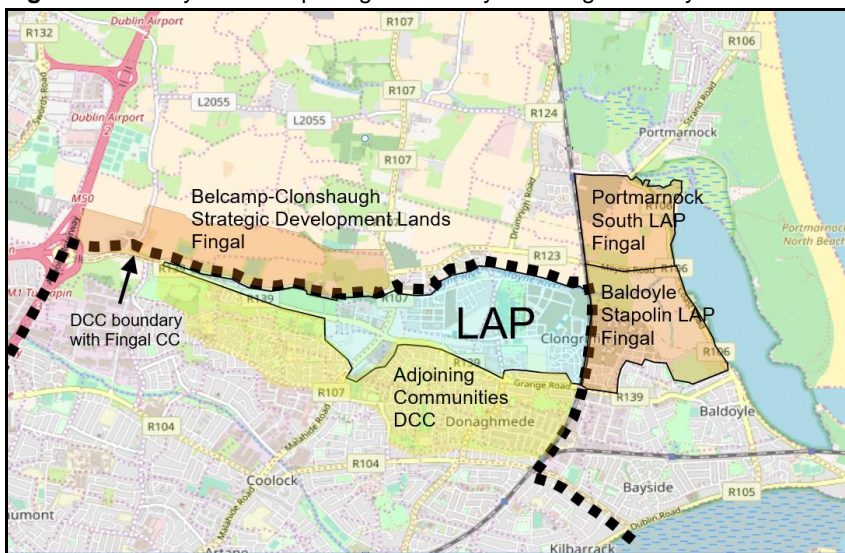


These key sites are subject to the preparation of a Masterplan by the Council. In order to evaluate the development potential of these Masterplan lands it is necessary to appraise them within the context of the wider study area and within the context of the Clongriffin–Belmayne Local Area Plan.

3.3.1 Economic and Retail Profile of Wider Study area

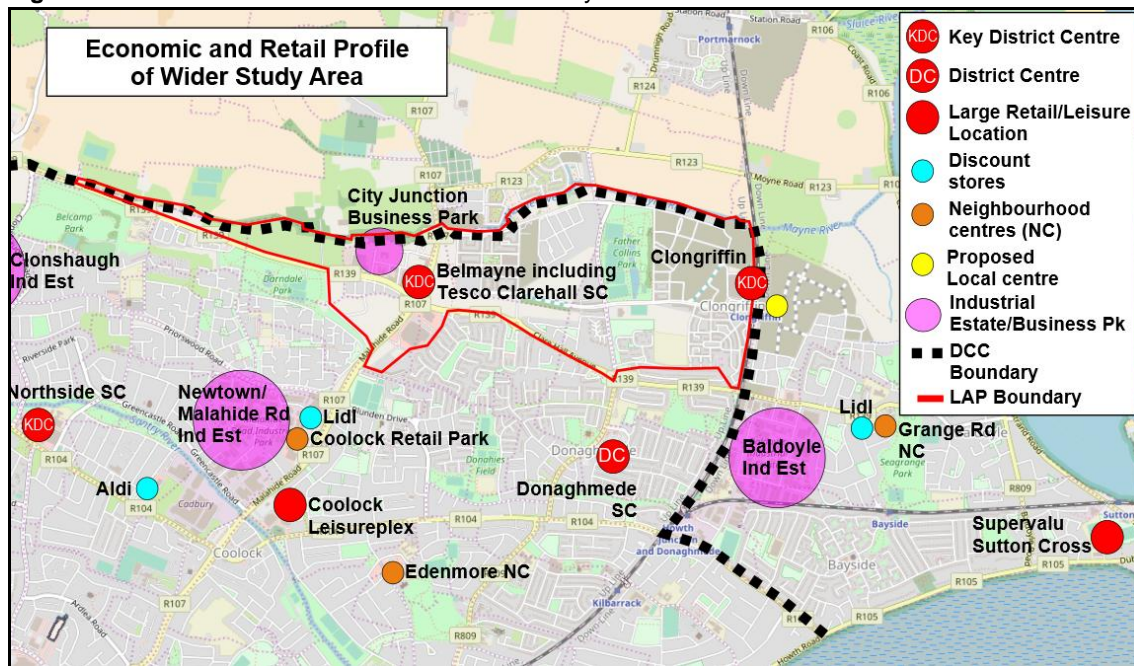
The Wider Study area for the Study Lands includes the LAP and adjoining Fingal lands to the north and east, as well as Dublin City Council lands to the south (Figure 3.2). There are significant land banks in Fingal identified for substantial residential and economic development, which are the subject of Local Area Plans. These include the Baldoyle–Stapolin Local Area Plan 2013 and Portmarnock South Local Area Plan 2013 (extended to 2023).

Figure 3.2: Study area comprising Dublin City and Fingal County Council lands



The distribution of the main retail and economic locations within the Wider Study area is displayed in Figure 3.3, some of which are located within Fingal. These include Baldoyle Industrial Estate, Lidl at the Racecourse Shopping Centre on Grange Road and Supervalu at Sutton Cross. The retail locations are all located within 5-10 minutes' drive of the Main Street in the LAP and the findings of the household survey recorded these locations as popular destinations for convenience goods (see Section 4 of this Study).

Figure 3.3: Economic and Retail Profile of Wider Study area



According to the Retail Strategy in the Dublin City Development Plan 2016-2022 Clongriffin-Belmayne is classified as a Level 3 retail centre within the Dublin retail hierarchy. As indicated below it is on a par with Northside Shopping Centre, which is also a Key District Centre.

Level 1 – Dublin City Centre;

Level 2 – None in Dublin City Council – nearest is Swords in Fingal;

Level 3 - **Clongriffin/Belmayne**, Phibsborough, Naas Road, Finglas, Northside Shopping Centre, Ballyfermot, Rathmines, Crumlin Shopping Centre, Donaghmede Shopping Centre, Omni, Ballymun, Point Village

Level 4 – Neighbourhood Centres – Coolock being the nearest. Aldi and Lidl can also be considered to function on a par with Level 4 centres.

Level 5 – Corner shops/small villages

In addition to the industrial/business parks that exist within the Wider Study Area, namely at Northern Cross, Baldoyle, Malahide Road and Clonshaugh, most employment uses are found in Donaghmede and Northside shopping centres. Together with the Clarehall Shopping Centre site in the Clongriffin-Belmayne KDC these are considered further below.

Industrial/business parks

Clongriffin-Belmayne LAP comprises the City Junction Business Park. It accommodates companies such as Bewleys, Aramark and Mylan Pharmaceuticals. Added to this there are sizeable industrial/business areas nearby at Newtown/Malahide Road, Baldoyle and Clonshaugh, which have appreciable levels of vacant units available. Furthermore, large-scale office use forms part of Masterplan proposals for Dublin Airport and hi-tech employment is to feature in Masterplans for two sites at Clonshaugh, Fingal.

Clarehall Shopping Centre Site

As part of the Clongriffin-Belmayne Key District Centre, Clarehall Shopping Centre opened in 2004 and has a gross floorspace of 17,300 gross sqm contained within nearly 30 units, including kiosk space (Figure 3.4). Built on three levels it is anchored by a Tesco Extra (10,000 circa gross sqm) and has over 800 free parking spaces. The Centre accommodates a National Drivers Licence Office, post office, dental surgery and doctor's surgery. A Tesco filling station also operates at the location.

There is also a parade of retail and service units located next to Clarehall Shopping Centre, on land commonly referred to as the site of the former Fitness First centre. There are 7 units here totaling 4,860sqm, with a further 3 units (721sqm GFA) applied for. When this parade of units is added to the Tesco Shopping Centre, it amounts to an overall total of 22,160sqm GFA.

Throughout this Study it is important to note that the term “Clarehall Shopping Centre site” refers to both the Shopping Centre and adjacent parade of units on the former Fitness First centre.

Figure 3.4: Clarehall Shopping Centre



Donaghmede District Centre

After the Clarehall Shopping Centre site, Donaghmede District Centre is the nearest large shopping centre to the residents of the LAP area. Opening in 1973 it comprises 17,180 gross retail sqm, some 50 units and 600 free parking spaces. According to the Centre management it has a weekly footfall of 65,000 people and an immediate catchment population of circa 90,000 people within a radius of 5km. It is anchored by Dunnes Stores and houses the City Council's library on the first floor. The Centre also contains a doctor's surgery and public house.

Northside Key District Centre

Built in 1970 Northside Shopping Centre is one of Dublin's oldest shopping centres. It comprises over 70 units and a retail floor area of approximately 14,000 gross sqm. It has been refurbished a number of times, most recently in 2016, and is anchored by the food retailers Dunnes, Supervalu and Iceland. It also accommodates the Council's Coolock swimming pool and there is a credit union on the first floor.

Footfall in 2015/2016 was estimated at 75,000 per week and there is parking provision for over 500 vehicles. Northside Shopping Centre has recently been advertised for sale.

Aldi and Lidl

There are two Lidl stores and one Aldi store within convenient drive time distance of the LAP area (Figure 3.2). They are standardised convenience stores that concentrate on selling limited product lines (circa 1300) in bulk. In common with most locations in Dublin these stores are very popular with high parking occupancy rates observed. Indeed, the latest March 2018 Kantar data for the country as a whole indicates that in the past three years the market share of Supervalu, Dunnes and Tesco (circa 22% each) has suffered at the expense of Lidl and Aldi, both of which have increased their market share from 9% to 11% respectively during this time.

3.4 Role and function of Key District Centre in LAP

An important element of the settlement strategy for the City is the development of key district centres (KDC) as urban centres for the suburbs. This is explained below.

"The key district centres (KDCs) represent the top-tier of urban centres outside the city centre, a number of which form part of the larger SDRAs. Each of the 8 KDCs underpins a wider area and acts as a strong spatial hub providing a comprehensive range of commercial and community services to the surrounding populations. All of the designated KDCs closely align to public transport rail corridors, with the exception of two (Finglas and Northside) which perform an important regeneration role for local communities. This development plan will reinforce the KDCs as sustainable anchors for the suburbs." P26, DCCDP 2016-2022

Clongriffin-Belmayne is one such KDC that was identified to cater for the northern expansion of Dublin. An Action Area Plan and more latterly a Local Area Plan were prepared to put flesh on the bones of this strategy. A commercial node was identified at each end of the LAP as jointly forming part of the Clongriffin-Belmayne Key District Centre. These two commercial nodes are linked by the creation of a Main Street. Outside of this so called "dumbbell" of mixed uses, land is mainly developed for residential use and is interspersed by open and recreational space and educational uses.

The two nodes of Clongriffin-Belmayne KDC are zoned for Z4 mixed uses, which allow for significant office development. With this in mind, a substantial office hub is built and available for occupation near Station Square at Clongriffin. Clongriffin-Belmayne LAP is also designated as a Strategic Development and Regeneration Area (SDRA) where Z14 employment uses are also permitted and open to consideration.

In terms of retailing, Key District Centres provide a sizeable convenience goods offer in the form of a supermarket or superstore for local shopping needs. They also afford an opportunity to provide for a degree of comparison goods shopping beyond the City Centre. The two uses are mutually interdependent in that the comparison goods shops rely upon the regular weekly custom of grocery shopping. Furthermore, they allow for related retail service and leisure service uses to develop at the location, such as personal care and restaurant uses.

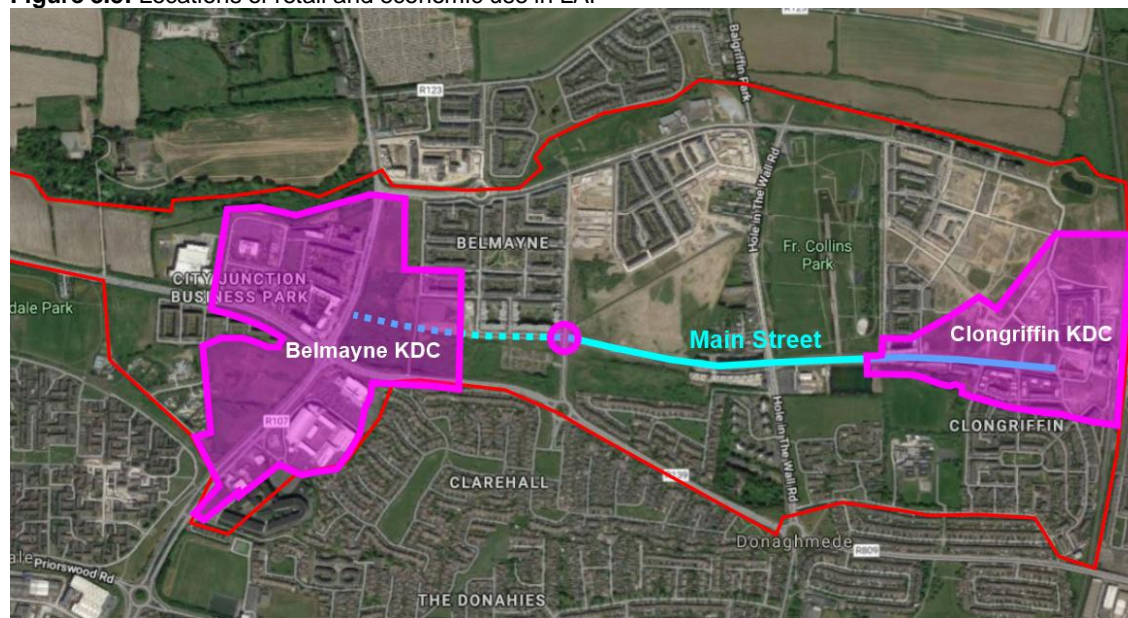
In terms of convenience goods shopping Clongriffin-Belmayne Key District Centre (KDC) is equipped with a Eurospar store at Northern Cross and a Centra store on Main Street, Clongriffin. The Eurospar store benefits from on-street parking and incorporates café space.

Other shops classified as selling convenience goods include the Fine Wines off-licence at Northern Cross and Carry Out off-licence on Main Street.

In terms of comparison goods floorspace in the KDC, Meadows and Byrne is the largest operator in the KDC with its store located within the same block (Burnell Court) as Eurospar. Technically, according to the Retail Planning Guidelines 2012, the pharmacies at Belmayne KDC and on Main Street can also be considered as shops selling comparison goods.

Following on from the above, the two nodes of the Belmayne-Clongriffin KDC, together the junction at Main Street/Belmayne Avenue constitute discrete subareas within the LAP. These are illustrated in Figure 3.5 and considered in greater detail below.

Figure 3.5: Locations of retail and economic use in LAP



3.5 Land use profile & health check of Key District Centre

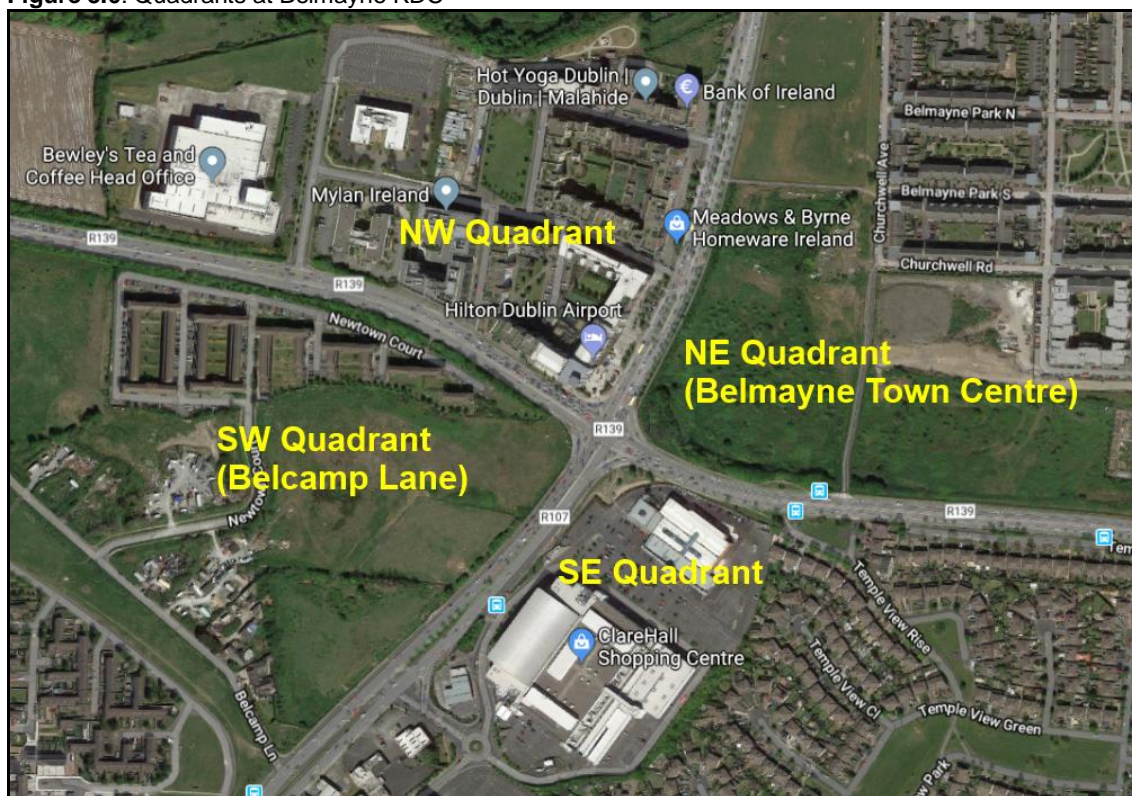
Having regard to the land use categories identified above in Sections 3.1 and 3.2 an outline of the built land use profile of each subarea in the LAP can be formulated. In order to draw comparisons with other studies the category of hotel use is excluded from the analysis. This is because the size of its floorspace is disproportionate to other uses and because not all District Centres have a hotel.

3.5.1 Belmayne Key District Centre

The Belmayne KDC is centred on lands at the junction of the R107 Malahide Road and R139 Link to M50/Grange Road. It constitutes the most prominent subarea within the LAP, with the R139 experiencing Annual Average Daily Traffic (AADT) flows of approximately 39,000 vehicles.

There are four quadrants at the Belmayne KDC, two of which (Northwest and Southeast) have been largely developed and two of which (Northeast and Southwest) have yet to be developed (Figure 3.6). The developed NW and SE quadrants are characterised by the presence of the Hilton Hotel and Clarehall Shopping Centre site respectively. The profile of the NW and SE areas is considered further below. The capacity to develop further retail and economic uses in the NE and SW quadrants, described in the LAP as the Belmayne Town Centre site and Belcamp Lane site respectively, is the focus of this Study.

Figure 3.6: Quadrants at Belmayne KDC



Northwest quadrant (Northern Cross)

The land use profile of the NW quadrant of Belmayne KDC by unit and floor area is contained in Table 3.1. This table relates to 3 blocks, which are currently anchored by the Hilton Hotel (Burnell Square), Meadows and Byrne (Burnell Court) and Bank of Ireland (Burnell Green). It can be seen that financial and

Table 3.1

Unit and floorspace use at Belmayne KDC (NW Quadrant – Northern Cross)				
	Units	%	Sqm	%
Convenience goods retailing	2	6%	524	7%
Comparison goods retailing	2	6%	1,908	26%
Retail Service	2	6%	370	5%
Leisure Service	1	3%	202	3%
Financial and professional office	5	14%	947	13%
Health	-	-	-	-
Community	-	-	-	-
Creche	1	3%	552	7%
Other	1	3%	68	1%
Vacant	22	61%	2,793	38%
Total	36	100%	7,364	100%

office use commands the largest number of units (5) while comparison goods retailing, particularly by Meadows and Byrne, occupies the greatest amount of floorspace (Figure 3.7). More importantly, perhaps, the table reveals that 61% of units for office and retail use are vacant, accounting for 38% of the floorspace. This is a significant proportion and this rate of vacancy is not unlike the other subareas, with the exception of the Clarehall shopping centre site in the southeast quadrant.

Figure 3.7: Meadows & Byrne (NW Quadrant)



Figure 3.8: Vacancy at Northern Cross (NW Quadrant)



Southeast quadrant (Clarehall Shopping Centre site)

Clarehall shopping centre and adjacent units in the SE Quadrant are essentially unaffected by vacancies (Table 3.2). The tabulated data for the Clarehall Shopping Centre site, which includes both the shopping centre and adjacent retail units, also highlights the scale of retail-led floorspace that is accessible to the population of the LAP, totaling 22,167 gross sqm.

Table 3.2

Unit and floorspace use at Belmayne KDC (SE Quadrant-Clarehall SC site)				
	Units	%	Gross sqm	%
Convenience goods retailing	3	10%	5,363	24%
Comparison goods retailing	12	40%	10,197	46%
Retail Service	8	27%	1,889	9%
Leisure Service	4	13%	1,180	5%
Financial and professional office	1	3%	2,512	11%
Health	2	7%	1,026	5%
Community	-	-	-	-
Creche	-	-	-	-
Other	-	-	-	-
Vacant	-	-	-	-
Total	30	100%	22,167	100%

Note: Tesco Extra is counted as a Convenience goods unit & Comparison goods unit

3.52 Belmayne Avenue/Main Street junction

Belmayne Avenue is a north-south distributor road that links the LAP area to the R139 Grange Road. A block of commercial premises is located northwest of its intersection with Main Street. This area is not designated as Key District Centre land. It is identified in the LAP as a community hub, with live-work units featuring prominently here.

The unit and floorspace breakdown for the developed mixed use block at the junction of Belmayne Avenue and Main Street is outlined in Table 3.3. Approximately 80% of the floorspace, which is largely assigned to studio and live/work use, is vacant. This includes a large prominent corner unit, circa 1,000 sqm on two

levels, which obtained planning permission for library use (Figure 3.9). This large unit, together with the live/work units, has never been occupied.

Table 3.3

Unit and floorspace use at Belmayne Avenue/Main St junction				
	Units	%	Sqm	%
Convenience goods retailing	1	9%	83	4%
Comparison goods retailing	-	-	-	-
Retail Service	1	9%	70	4%
Leisure Service	2	18%	214	11%
Financial and professional office	-	-	-	-
Health	-	-	-	-
Community	-	-	-	-
Creche	-	-	-	-
Other	-	-	-	-
Vacant*	7	64%	1,496	80%
Total	11	100%	1,863	100%
* Vacant studio, live-work unit				

Figure 3.9: Large vacant corner unit



Figure 3.10: Main St units off Belmayne Ave



3.53 Clongriffin & Main Street Key District Centre

The Congriffin node of the Key District Centre is centred on the Clongriffin Railway Station and Bus Terminal, Station Square and Main Street linked to it. Station Square has free park and ride provision for 400 vehicles.

A high percentage of vacant floorspace (82%) exists at Clongriffin and Main Street. Even though this figure is skewed slightly by the amount of vacant office hub space, it does not detract from the finding that 64% of units are vacant. Leisure services in the form of eateries help account for the largest floorspace use here.

Table 3.4

Unit and floorspace use at Clongriffin Main St				
	Units	%	Sqm	%
Convenience goods retailing	3	7%	306	2%
Comparison goods retailing	1	2%	163	1%
Retail Service	3	7%	164	1%
Leisure Service	3	7%	1,086	8%
Financial and professional office	1	2%	121	1%
Health	2	5%	397	3%
Community	2	5%	191	1%
Creche	-	-	-	-
Other	-	-	-	-
Vacant	27	64%	11,282	82%
Total	42	100%	13,710	100%

Figures 3.11 & 3.12: Commercial units along Main Street

Total retail & economic space in LAP

When the floorspace findings in the preceding tables for each location in the LAP are aggregated, including for vacancies, the overall distribution of floorspace across the LAP can be tabulated. Table 3.5 notably demonstrates that roughly half of the built retail and economic floorspace (49%) is located in the southeast quadrant of Belmayne KDC, namely on the Clarehall Shopping Centre site.

Table 3.5

Total retail and economic floorspace (including vacancies) built in LAP		
Total Floorspace	Gross sqm	Percentage
Clongriffin & Main St KDC	13,710	30%
Belmayne Ave/Main St	1,863	4%
Belmayne KDC	7,364	16%
Subtotal	22,937	51%
Clarehall Shopping Centre	17,306	38%
Adjacent block of units	4,861	11%
Subtotal	22,167	49%
Total	45,104	100%

Vacancy in LAP

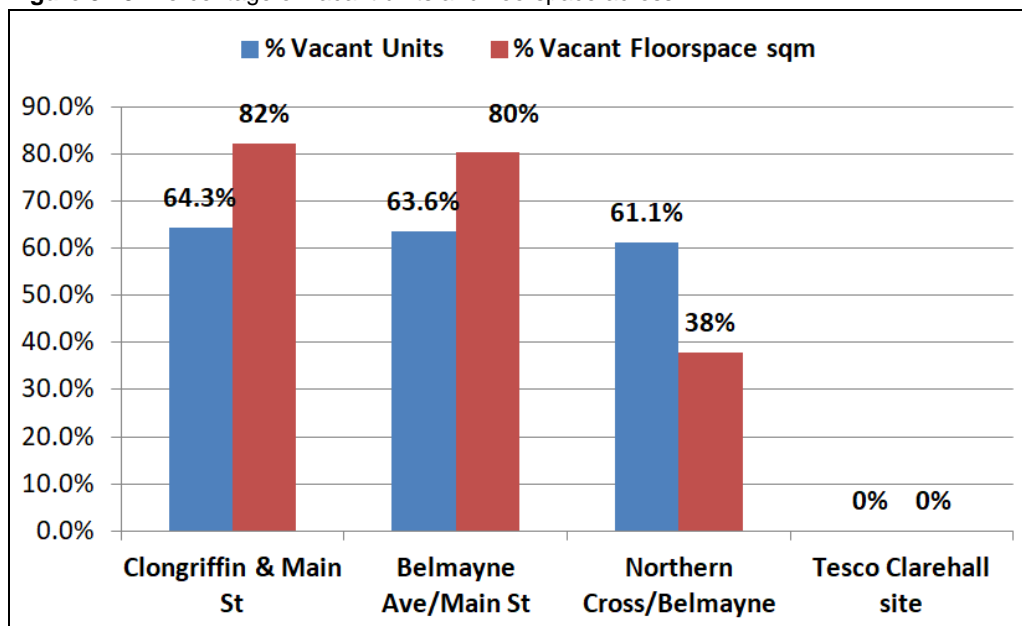
Vacancy in the LAP totals 15,571 gross sqm (35% of floorspace) and 56 units (47% of all units). The exclusion of the Clarehall Shopping Centre site from the analysis, which is fully let, increases these vacancy rates considerably.

Table 3.6

Floorspace and unit vacancy in LAP		
	Gross sqm	No. of units
Clongriffin & Main St KDC	11,282	27
Belmayne Ave/Main St	1,496	7
Belmayne KDC	2,793	22
Total	15,571	56

The percentage breakdown of vacancy for each of the subareas within the LAP is shown in Figure 3.13. It can be seen that the proportion of vacant units at the respective Clongriffin/Main Street KDC and Belmayne KDC is 64.3% and 61.1% respectively. In contrast, the Clarehall Shopping Centre site is unaffected by vacancies.

Figure 3.13: Percentage of vacant units and floorspace across LAP



Figures 3.14 & 3.15: Vacant office and retail space at Clongriffin



3.6 Census profile of LAP

This subsection of the Study provides a succinct analysis of the 2016 census findings for the LAP area and compares them with the 2011 findings contained in the LAP (albeit they were preliminary at the time of preparing the LAP). These relate to the three main Electoral Divisions (EDs) that apply to the LAP area, namely Grange A, Grange B and Priorswood C. The extent of the EDs is graphically illustrated in the Figure 3.16. It should be noted that the EDs include areas outside the LAP boundary but remain the focus of this census analysis in order to be consistent with the 2011 findings in the LAP.

Figure 3.16: Electoral Divisions in LAP

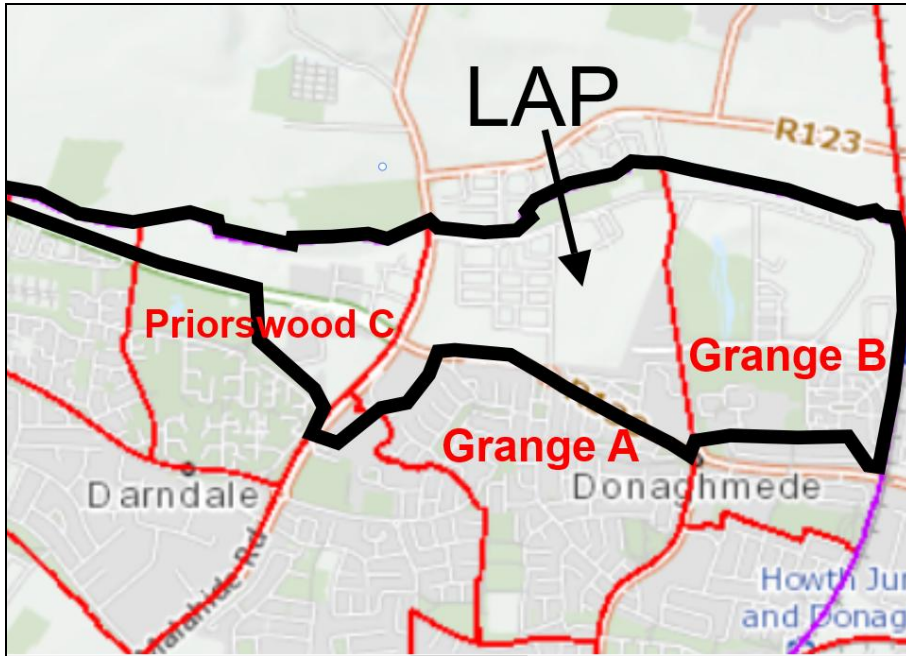
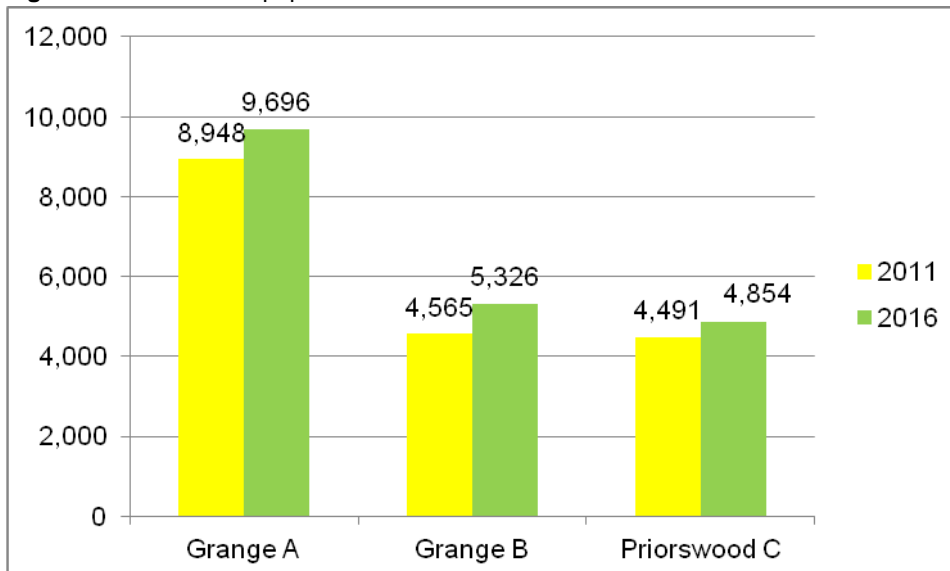


Figure 3.17 indicates that each of the EDs grew appreciably between 2011 and 2016. Collectively, population increased by a total of 1,872 persons from 18,004 in 2011 to 19,876 in 2016. This represents a 10.4% increase on the 2011 recording. The specific population within the LAP boundary is detailed in Section 3.7, which deals with population projections.

Figure 3.17: Growth in population 2011-2016 in 3 main EDs in LAP

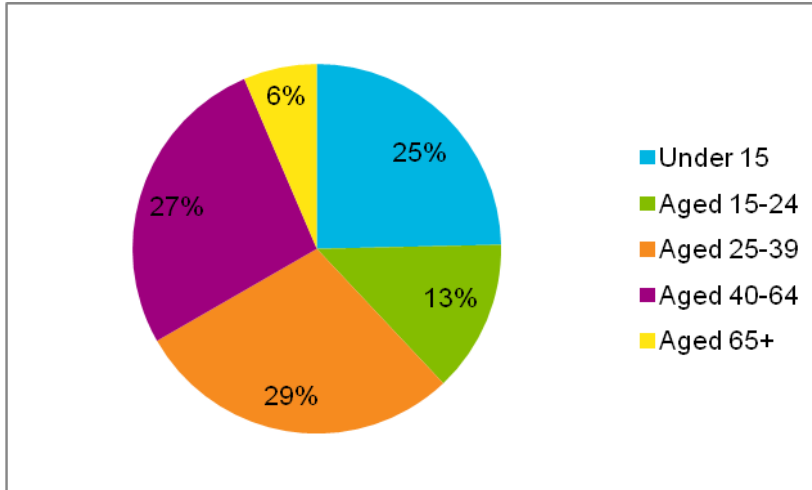


Age profile

The area has an exceptionally youthful population profile, with a quarter of the population under 15 compared to 15% for Dublin City Council as a whole (Figure 3.18). At the other end of the spectrum the proportion of people aged 65 and over is below half that for Dublin (6% v 13%) and this 6% figure has remained unchanged from 2011.

The youthful demographic of the area is also underscored by the observation that the majority age group in the area is the 25-39 age band (29%) when previously it was the 40-64 age band in 2011 (28%).

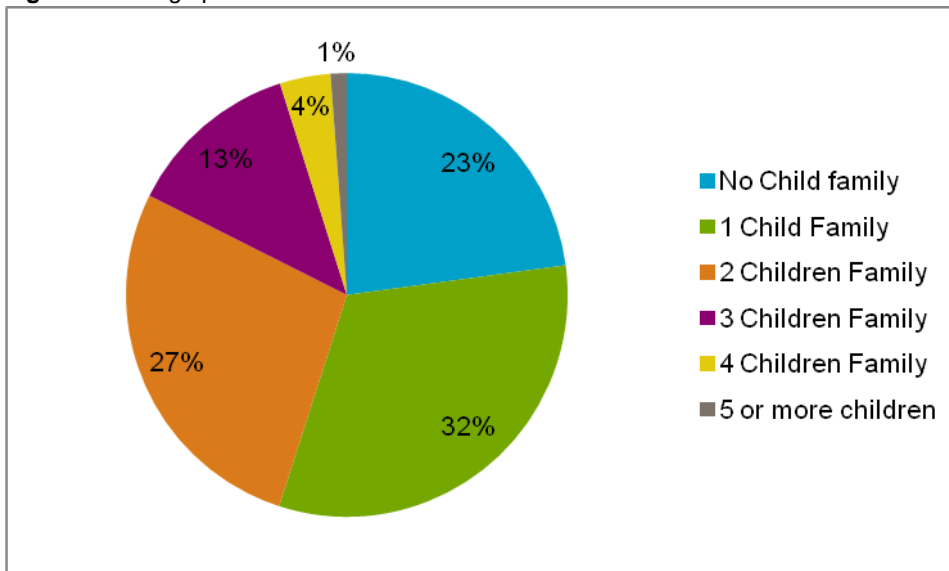
Figure 3.18: Age profile of LAP area 2016



Family unit size

One child families are the most common unit size in the area (32%), followed by two children families (27%). The percentage of no child families stands at 23% (Figure 3.19). These proportions have changed only slightly since the 2011 census.

Figure 3.19: Age profile of LAP area 2016



In keeping with the national trend, household size in the EDs has actually increased between 2011 and 2016, increasing from 2.92 to 3.02 (Table 3.7).

Table 3.7

Average household size 2011-2016		
Electoral division	2011	2016
Grange A	3.24	3.17
Grange B	2.67	2.86
Priorswood C	2.84	3.02
Average	2.92	3.02

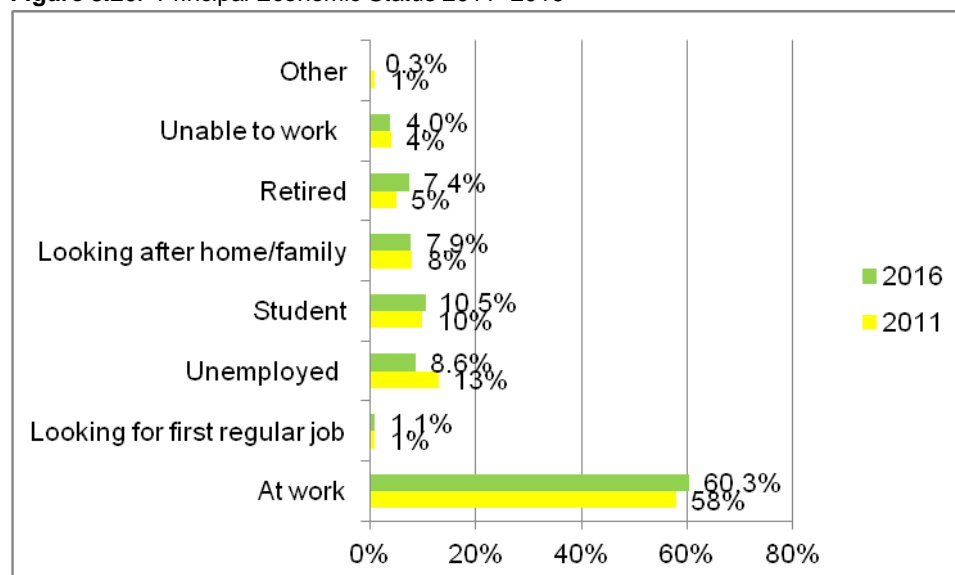
The average household size of 3.02 is larger than the average for Dublin City Council (2.48). This smaller size is also reflected in the fact that over three quarters of households (77%) have 1 child or more compared to 65% for Dublin.

Principal economic status

Figure 3.20 illustrates that, in line with figures at state level, the rate of unemployment has declined from 13% in 2011 to 8.6% in 2016. Latest economic reports would suggest that this rate is even lower in 2018.

Despite the youthful population profile of the area the proportion of retired people has increased (5% to 7.4%) while the proportion of students in the area has remained roughly the same (circa 10%).

Figure 3.20: Principal Economic Status 2011- 2016



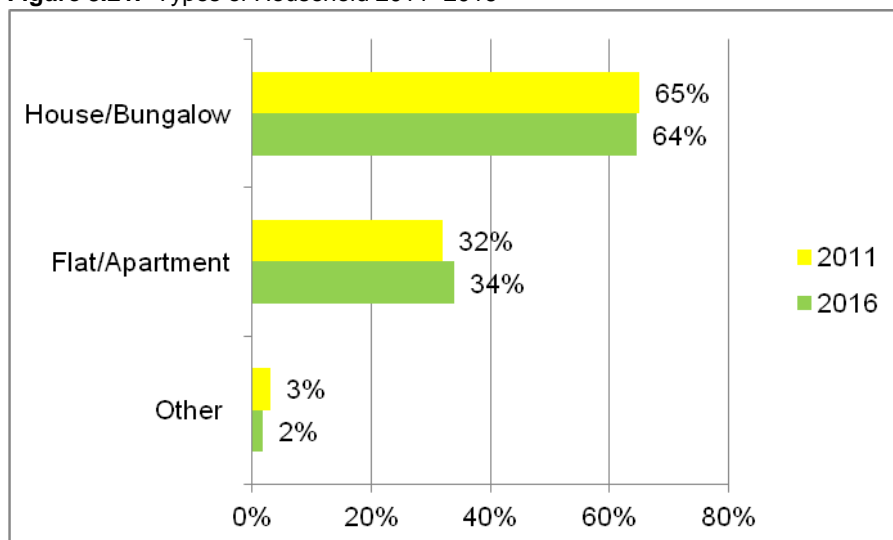
Occupational status

Of those people in work, examination of their occupational status reveals that the area is under-represented by the number of professional occupations (11% V 21% across the City). So too, as a corollary of the latter finding, there is an overrepresentation of people employed in the lower income occupations such as (i) Caring, Leisure and Other Service (ii) Sales and Customer Service and (iii) Process, Plant and Machine Operatives. These occupations account for a quarter of the jobs in the area compared to 17% in Dublin City Council.

Household types

Within the 3 EDs that cover the bulk of the LAP area it can be seen from Figure 3.21 that approximately a third of dwellings are apartments, with the remaining two thirds houses. These proportions have changed little between 2011 and 2016. This is in keeping with the profile of Dublin City Council as a whole. However, when the analysis is strictly confined to the LAP boundary within these 3 EDs, figures received from the City Council for 2017 indicate that the reverse is the case, in the respect that two thirds of dwellings are apartments and a third houses.

Figure 3.21: Types of Household 2011- 2016



Household tenure

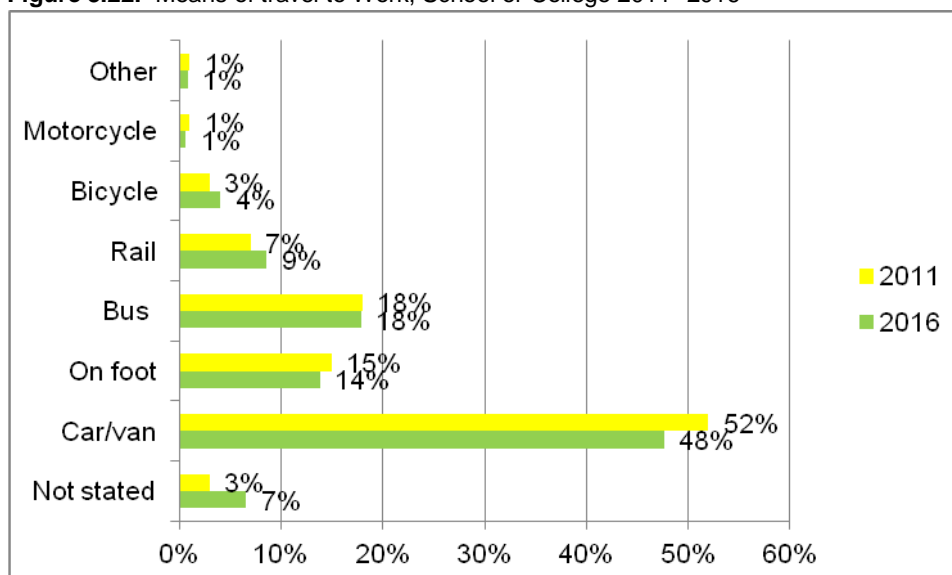
Home ownership (with and without mortgage) is the most common form of housing occupancy (55% v 51% average for DCC). Private renting is lower than in the rest of Dublin (21% v 29%) while renting from the Council and a Voluntary Body combined is higher (20% v 13%).

Means of travel to Work, School or College

Commuting by car still remains the most popular means of travel (48%) but it has decreased from 52% in 2011 (Figure 3.22). Nonetheless, it is still considerably higher than the percentage figure for Dublin City Council as a whole (34%). Interestingly, car ownership is higher here than in the rest of Dublin City Council (81% v 66%).

Travel by rail (9%) and by bicycle (4%) has increased slightly on 2011 levels. Travel by train is slightly higher than the Dublin average (9% v 6%)

Figure 3.22: Means of travel to Work, School or College 2011- 2016



Significantly fewer people walk (14% v 25%) or cycle (4% v 10%) to work/school or college compared to the Dublin average.

In general, 7 out of 10 people take ¼ hr or less to travel to work/school or college, which is in keeping with the average journey time in DCC.

Nationality

Census results indicate that the percentage of non-Irish nationals in the area doubled from 6% in 2006 to 13% in 2011. The 2016 census findings record this rate at 14%, though it should be noted that the proportion of non-Irish nationals in the ED covering Clongriffin is particularly high (22.4%) compared to the Dublin average of 17%.

3.7 Population projections

Population in LAP

The boundary of the LAP includes population in parts of 4 electoral divisions (EDs) named Grange A, Grange B, Priorswood C and, to a considerably lesser extent, Ayrfield. In 2016, the population amounted to 9,589 people (Table 3.8).

Table 3.8

2016 Population of LAP by Electoral Division	
Electoral Division	Population 2016
Grange A*	3,493
Grange B*	3,798
Priorswood C*	2,042
Ayrfield*	256
Total	9,589

* parts of Electoral Divisions

The latest census results for the period 2011-2016 (Table 3.9) indicate that population growth within the Clongriffin-Belmayne LAP boundary was over a quarter during these years (25.8%), far in excess of the rate of growth in Dublin City Council and the State as a whole (5.1% and 3.8% respectively).

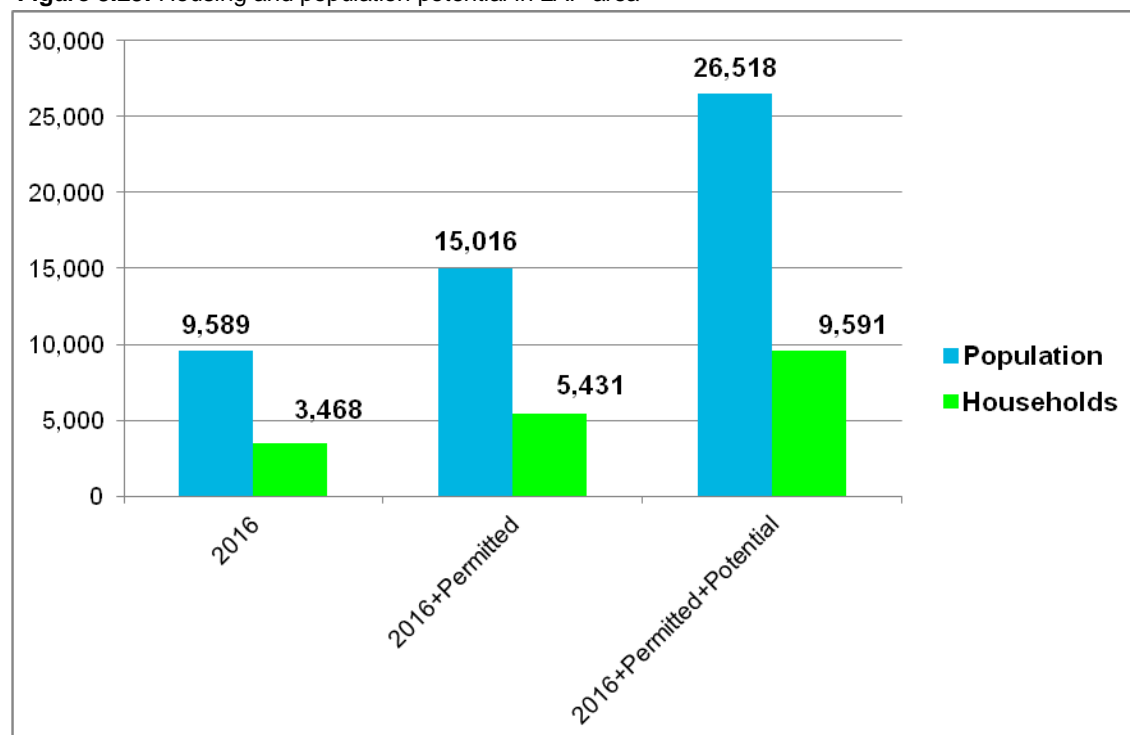
Table 3.9

Population change in LAP relative to Dublin & the State			
	2011	2016	% change
LAP	7,620	9,589	25.8%
Dublin City Council	527,612	554,554	5.1%
State	4,588,252	4,761,865	3.8%

Source: CSO Census results 2016

The LAP has capacity to increase significantly in size from 9,589 persons to 26,518 persons in the coming years (Figure 3.23). This projection is based on the following factors: the number of planning permissions granted for housing to date; the assumed densities of potential housing in the future; and the application of a household size of 2.76 as recorded for the LAP in the 2016 census. In respect of projected densities, it is assumed that remaining undeveloped lands will be built at an approximate density of 100 units per hectare. This assumption of higher density reflects recent national guidance for apartment development.⁵ It points to the scope for higher densities in locations near rail and bus services. It is also in acknowledgement of latest research findings which indicate that six storey buildings are considered the optimum height for densification from the perspective of economic viability⁶

Figure 3.23: Housing and population potential in LAP area



Source: 2016 Census, application of household size (2.76) to permitted housing units and potential housing units, with amount of potential housing estimated on basis of 100 units per ha

⁵ Section 2.4, Sustainable Urban Housing Design Standards for New Apartments, March 2018

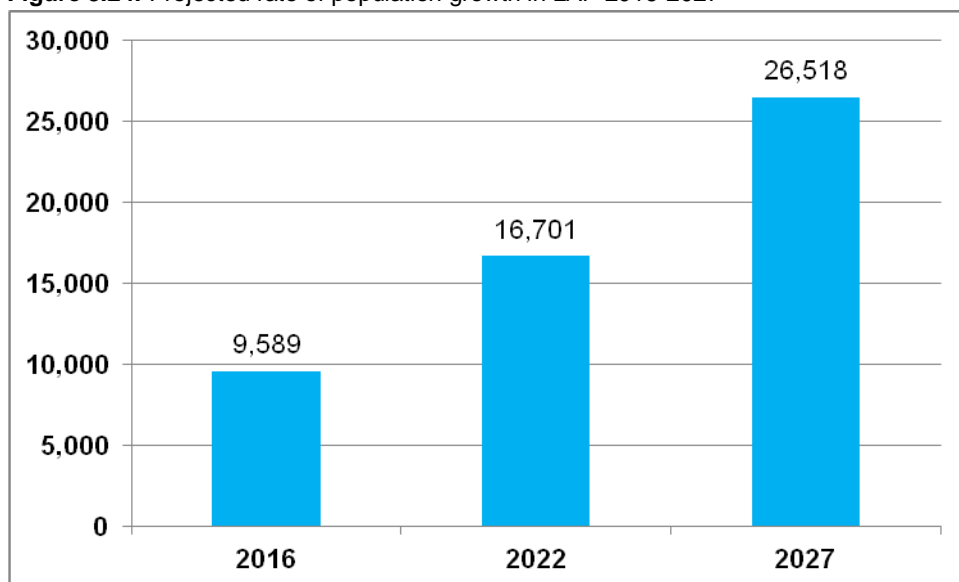
⁶ Review of Delivery Costs and Viability for Affordable Residential Developments, Action Plan for housing and homelessness by Rebuilding Ireland, Jan 2018

Projected rate of population growth in LAP

Regional population growth forecasts released by the Central Statistics Office (CSO) in December 2013 estimate that the population in Dublin City will increase by 0.9% per annum between the years 2011 and 2031. However, as an emerging community, the rate of growth within the LAP will understandably be much higher – as evidenced during the period 2011-2016 when it amounted to 5.2% per annum compared to the 1% annual average for Dublin City.

With the economy improving, together with the scope for higher density development, it is anticipated that the rate of residential growth in the LAP will increase considerably in the foreseeable future (16% per annum). Based on this rate of growth figure 3.24 illustrates that it could take until the year 2027 for the LAP to reach its full potential, in terms of being fully developed.

Figure 3.24: Projected rate of population growth in LAP 2016-2027



Population in neighbouring Fingal lands

Latest records indicate that permission for housing in the adjacent Fingal lands at Balgriffin, Belcamp and Baldoyle could nearly double the population in these areas from 3,977 in 2016 to 7,257 by 2027 (Table 3.10). The future population was estimated on the basis of the 2016 average household size for the respective electoral divisions, namely 3.47 for Balgriffin and Belcamp and 2.78 for Baldoyle.

As with national trends household size actually increased in these EDs between 2011 and 2016. While the increase in household size has largely been attributed to the lack of housing supply there is little doubt that the accommodation of young families in these new housing developments is also a material factor in recording a high household size at the local level.

Table 3.10

	Existing 2016		Proposed*		Total 2027	
	Houses	Population	Houses	Population	Houses	Population
Balgriffin	459	1,593	246	854	705	2,446
Belcamp	14	49	262	909	276	958
Baldoyle	840	2,335	546	1,518	1,386	3,853
	1,313	3,977	1,054	3,281	2,367	7,257

* Balgriffin permission for 246 residential units (F07A/0394/E1)
 * Belcamp permissions for 262 residential units (F15A/009) (F15A/0609)
 * Baldoyle permission for 546 residential units (F16A/0412)

3.8 Conclusion

Within the context of the above information it is clear that the LAP is a distinct area with its own land use profile and socio-economic attributes. Targeted for significant residential growth, each end of the LAP at Belmayne and Clongriffin has been designated for Key District Centre use in order to provide for the retail and economic service needs of this new community. However, with the recession in 2007/2008 the Key District Centre has been severely affected by the downturn in commercial and residential investment, resulting in abnormal levels of vacancy. It is against this background that the Study is tasked with assessing the need for additional development of this type on mainly Council-owned lands at Belcamp Lane and Belmayne.



**Stakeholder Consultation
& Household Survey**

04

4.0 Stakeholder Consultation & Household Survey

4.0 Introduction

Integral components of the Study involved undertaking a consultation workshop with key stakeholders in the area and carrying out a household survey of residents in the Clongriffin-Belmayne LAP area. The survey was targeted at acquiring facts on shopper behaviour and obtaining the public's views of the area.

4.1 Workshop

A consultation workshop with key stakeholders was convened in the Hilton Hotel on the 26th January 2018. Together with the Lord Mayor some 2 dozen representatives from a range of interests in the public and private sector participated. The organisations and persons in attendance included:

- The Lord Mayor
- Discovery Centre
- Gannon Homes
- Dublin City Council
- CCK Architects
- Community Forum
- Discovery CTC
- Cairn Homes
- Councillor Gilliland
- Fingal County Council
- Walls group
- Brock McClure consultants
- Health Service Executive
- Parish Council
- National Transport Authority

The exercise sought to elicit people's views of the area and to probe the potential for future development. The detailed discussions greatly assisted in the formulation of a SWOC analysis, which is considered later in Section 5.0 of this Study. The workshop also highlighted potential uses that could be facilitated in the area.

4.2 Household Survey Methodology

The survey involved the commissioning of an independent research body, Strategic Research and Insight, to carry out a landline and mobile telephone survey of over 300 households in the study area. It was primarily based on a stratified random sample of the population residing in the 4 electoral divisions (EDs) that comprise the LAP area. These are Grange A, Grange B, Priorswood C and to a lesser extent Ayrfield. In addition, due to its adjoining and convenient proximity to the LAP, the neighbouring ED of Balgriffin was also surveyed. The proportion of persons surveyed from each ED is shown in Figure 4.1.

Figure 4.1: Percentage of respondents from each Electoral Division in LAP



In terms of its reliability, the sample size of 319 respondents accords with a 93 per cent confidence level, resulting in only a 7 per cent margin for error in the findings. Ideally, it was desirable to achieve a sample size of 370 persons to align with the standard 5 per cent margin of error however the lower return was not unexpected given the relatively small size of the survey area and given its ongoing development.

Questionnaire

The survey consisted of 17 questions to be completed during a 10 minute phone call (a copy of the questionnaire is attached in Appendix 4.1). The questions were aimed at identifying shopping patterns in the area and acquiring the community's views of the area.

Results

Aggregate results were provided for the sample size as a whole, together with detailed retail results for each of the EDs surveyed. Nearly 70% of the respondents were female. Key findings in relation to retailing and the views of the community are documented below. A breakdown of the full tabulated recordings is included in Appendix 4.2.

4.3 Key findings on Convenience goods shopping

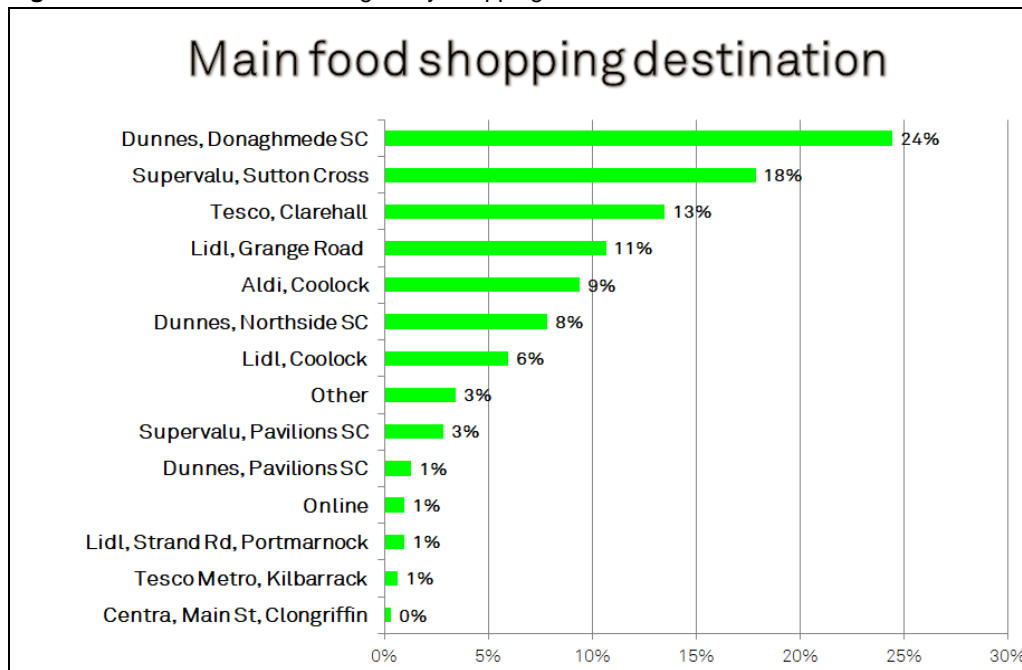
The main survey findings in respect of convenience goods shopping are outlined below.

Main food shopping location

As shown in Figure 4.2 the survey revealed that Dunnes in Donaghmede Shopping Centre is the most popular foodstore (24% of respondents cited it as their main foodstore). Supervalu at Sutton Cross features next highest (18%) with Tesco at Clarehall coming third (13%). Interestingly, when all their percentages are summated, the combined Aldi and Lidl market share is greatest at 27%. This is not surprising given their current popularity. The absence of Eurospar at Northern Cross from the findings can perhaps be explained by the fact that it is not considered a "Main shopping location", wherein it does not largely cater for weekly and fortnightly bulk purchases.

Only 1% of people stated they did most of their food shopping online. Data from Eurostat in 2016 recorded that 8% of people in Ireland purchased some or all of their groceries online, which was more than double the figure in 2008 (3%).

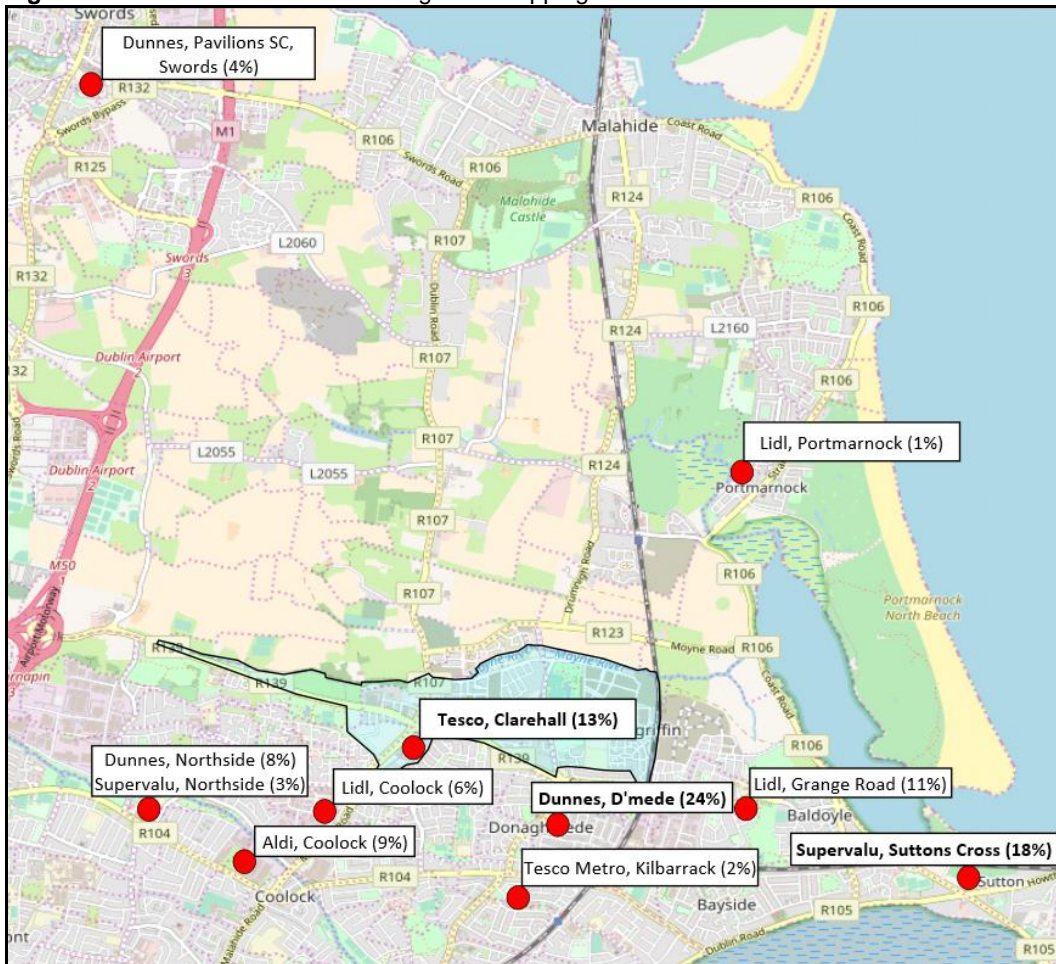
Figure 4.2: Main destination for grocery shopping



Based on the above findings it can be inferred from Tesco Clarehall’s 13% market share that most expenditure on convenience goods (i.e. 87% balance) leaks to retail centres beyond the LAP area.

Figure 4.3 maps the locations for convenience goods shopping by people in the LAP, with the 3 most popular destinations highlighted in bold.

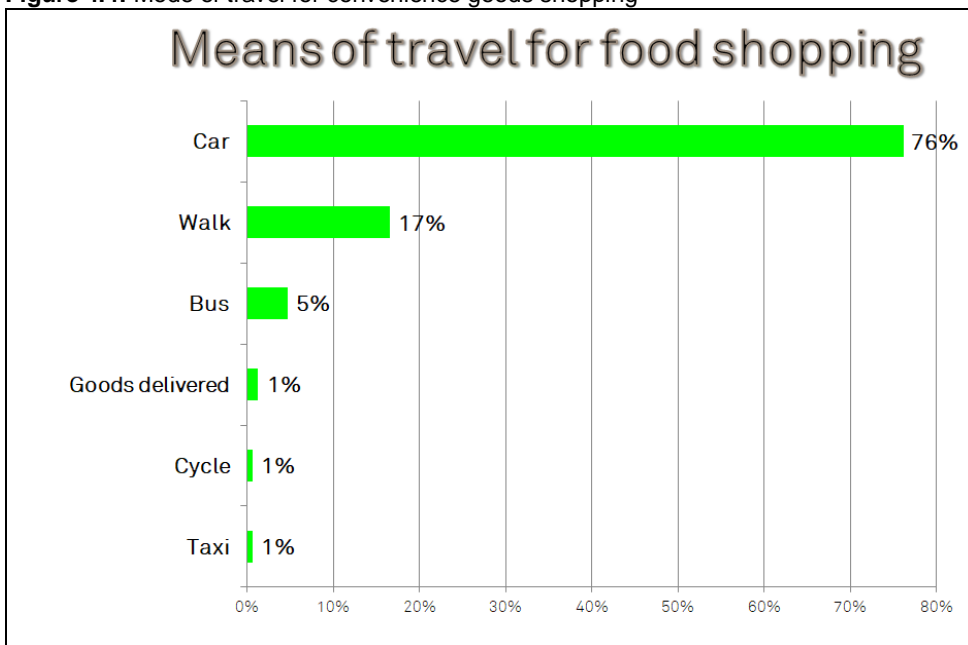
Figure 4.3: Locations for convenience goods shopping



Mode of travel

In keeping with national trends the car is the most popular form of transport for food shopping trips (76%), followed by walking (17%) and bus (5%).

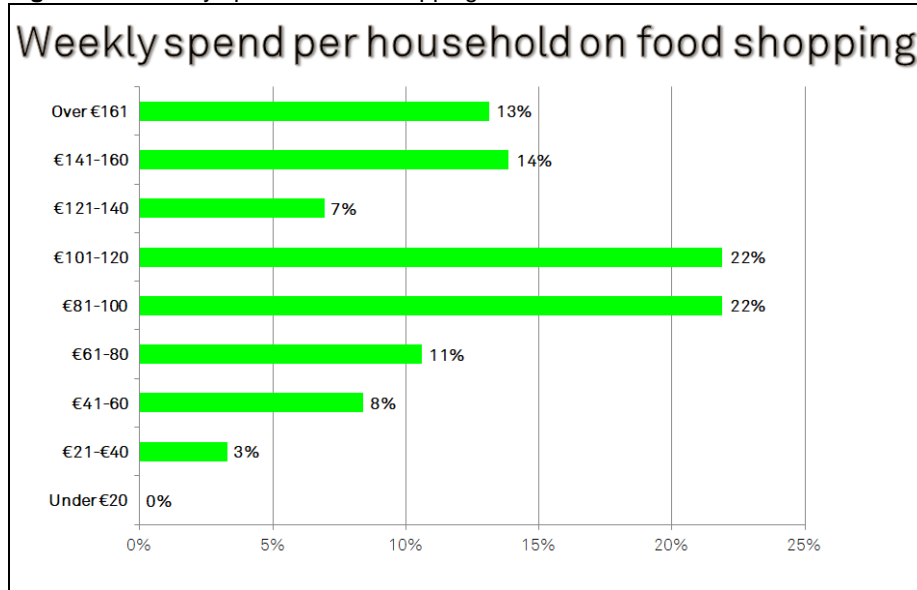
Figure 4.4: Mode of travel for convenience goods shopping



Expenditure

The survey results indicate that most households spend between €80 and €120 per week on food shopping (Figure 4.5). When this figure is divided by the average household size of 2.76 for the LAP area, this approximates to €43 per head per week.

Figure 4.5: Weekly spend on food shopping



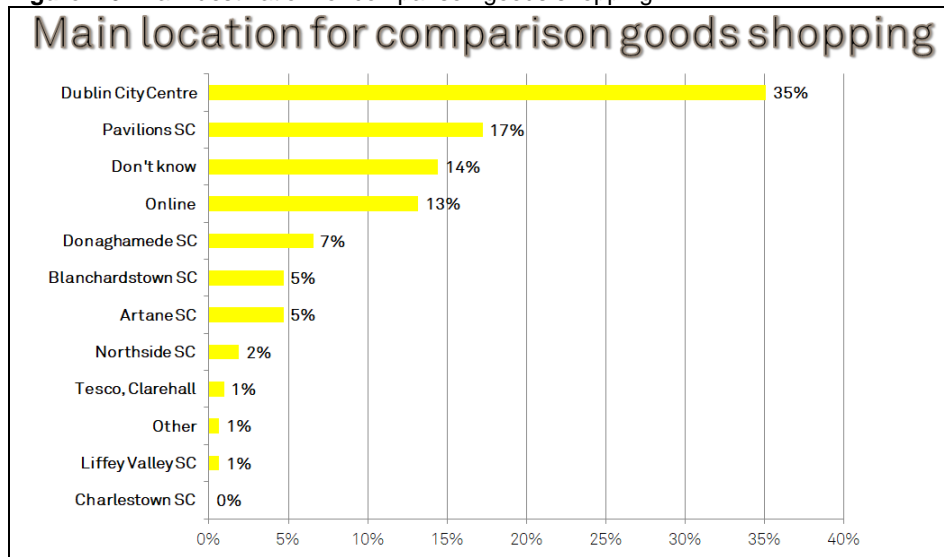
4.4 Key Findings on Comparison goods shopping

The survey findings in relation to comparison goods shopping are recorded below.

Main non-food shopping location

Dublin City Centre is the most popular destination for comparison goods shopping (35%) followed by the Pavilions Shopping Centre (17%) and online shopping (13%). Donaghmede Shopping Centre features next highest (7%). Tesco, Clarehall, which is part of the Clongriffin-Belmayne KDC, accounts for 1% of the recordings.

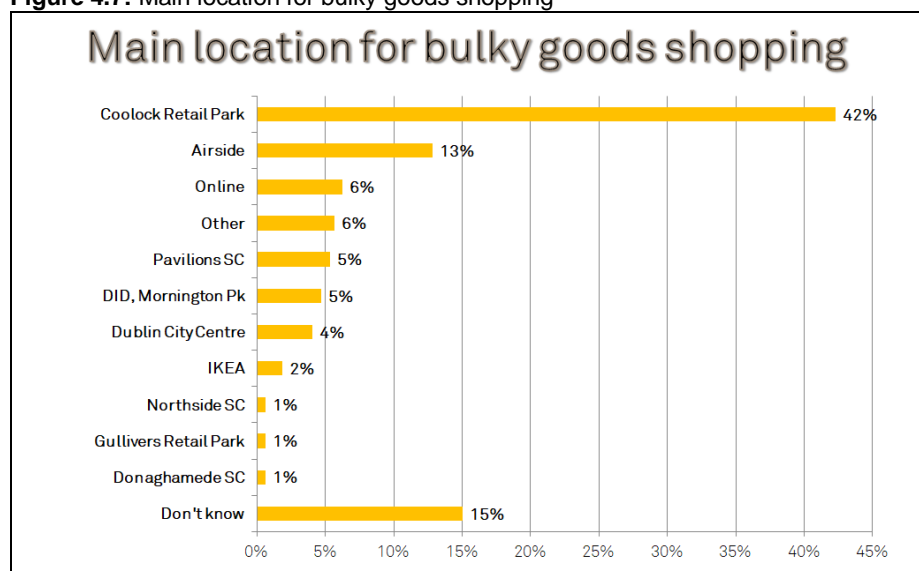
Figure 4.6: Main destination for comparison goods shopping



Bulky goods shopping

The survey revealed that retail warehouse locations, with adjacent surface level parking, such as Coolock Retail Park (42%) and Airside Retail Park (13%) represent the greatest attraction for bulky goods shoppers. Online shopping was the third most popular means of purchasing bulky comparison items at 6%.

Figure 4.7: Main location for bulky goods shopping



Online shopping

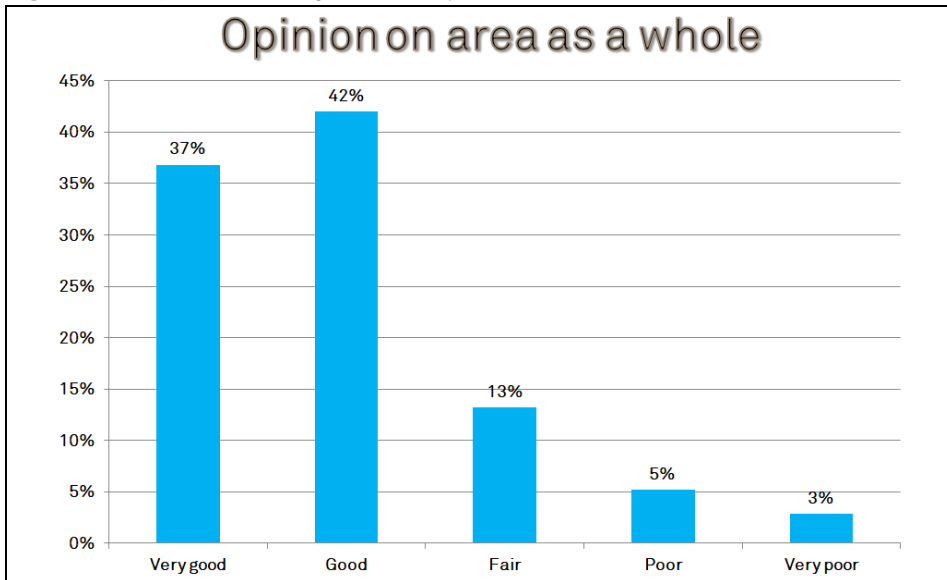
The growing popularity of online shopping for comparison goods is in keeping with the Eurostat data for 2016, which recorded that 61% of people in Ireland shopped online for some of their clothes and shoes. This is noticeably higher than the 2008 Eurostat figure of 11%.

4.5 Views on the LAP area

The second part of the survey canvassed people's views on the area, in terms of how they rated it and what issues and types of development are considered important to them. Figure 4.8 reveals that only 8% of people considered the area to be poor or very poor.

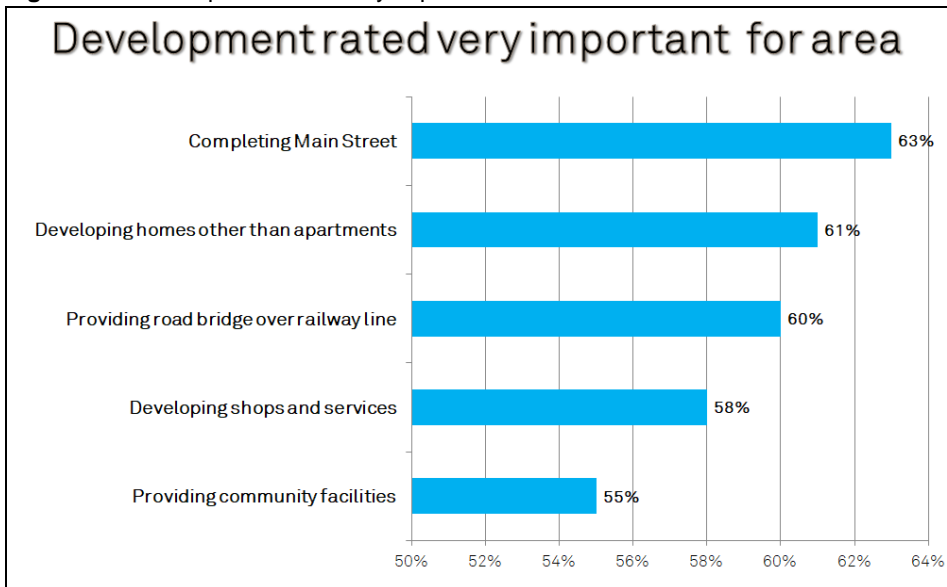
The unfinished nature of the area was the most common reason for peoples' dissatisfaction.

Figure 4.8: Opinion on Clongriffin-Belmayne area



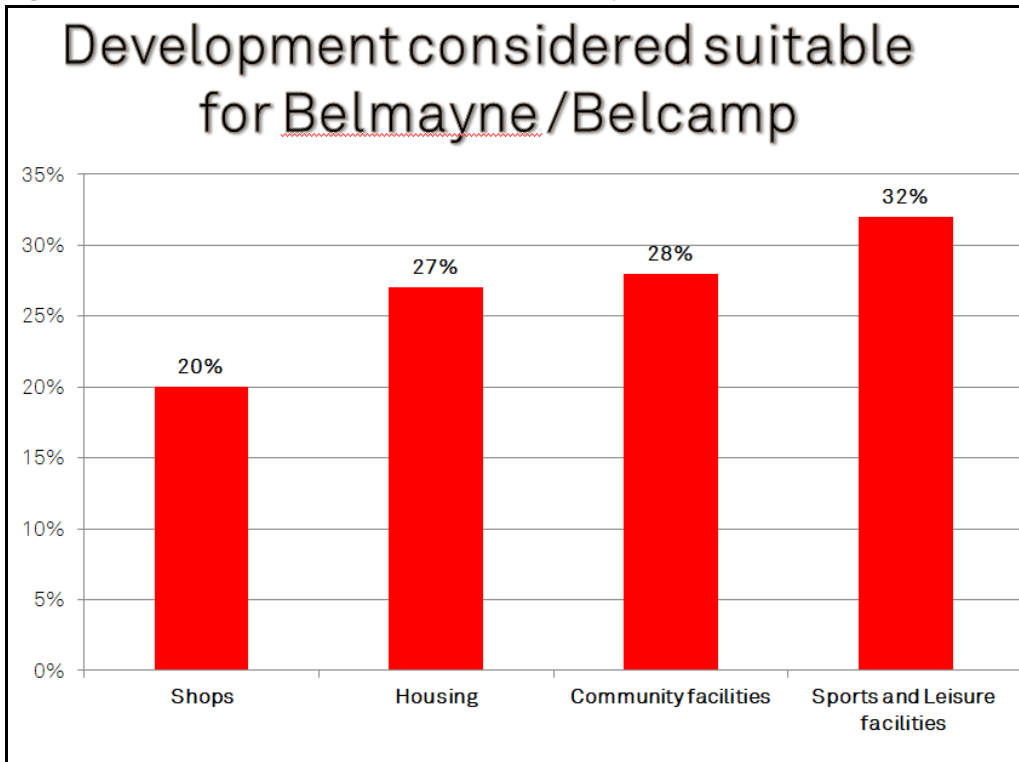
In order to elicit feedback from residents the survey then presented a number of development options for respondents to rate, in terms of their perceived importance for the area. Figure 4.9 highlights those development options which 50% of people or more rated to be very important for the area. It can be seen that completing the Main Street featured highest.

Figure 4.9: Development rated very important for area



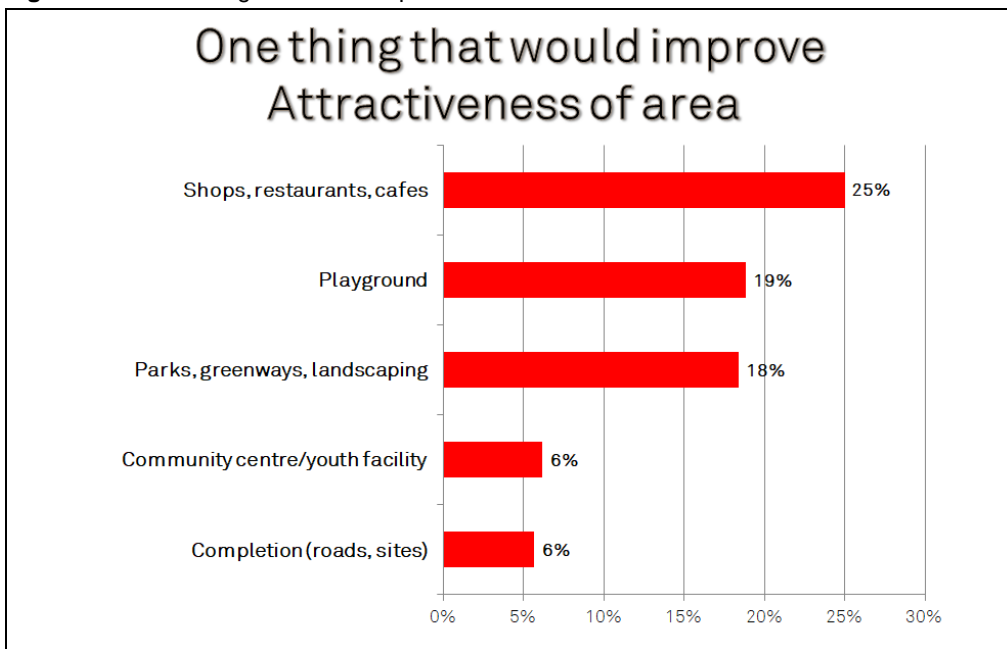
When questioned specifically on uses considered suitable for the development of key lands at Belmayne Town Centre/Belcamp Lane the most popular uses related to sporting and community facilities, housing and shops (Figure 4.10). It is quite possible that the high figure for sports and leisure facilities is a reflection of the recent approval for the Multi Use Games Area (MUGA) at this location.

Figure 4.10: Development considered suitable for Belmayne Town Centre/Belcamp Lane



The final question was entirely open-ended and unprompted in the respect that people were asked what one thing would improve the attractiveness of the area. The provision of shops, restaurants and cafes came top, with a quarter stating the need for them (Figure 4.11). Other desirable development included the provision of playgrounds, parks and community facilities. It is likely that the “parks, greenways and landscaping” response displayed in Figure 4.11 is partly associated with the overarching desire to have the development of the area completed.

Figure 4.11: One thing that would improve attractiveness of area



4.6 Conclusion

The results of the household survey help to put evidential flesh on the bones of anecdotal observations on the ground. It was particularly helpful in identifying shopping patterns and providing an insight into people's opinion of the area. The results are particularly useful in informing assumptions which underpin the assessment of capacity for further retail and economic development in the LAP.

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Economic Outlook

05

5.0 Economic Outlook

5.0 Introduction

This section provides a succinct overview of the economic outlook for the Clongriffin-Belmayne KDC. This overview is based on economic indicators, a SWOC analysis of the LAP area and comparative analysis with other District Centres.

5.1 Economic outlook

At present the national outlook for employment and the trade of the retail and service sectors seems quite favourable.

Economic forecasters “Trading Economics” predict that unemployment at the national level will fall further to 5% by 2020, from its latest rate of 6.1%. In addition, they forecast that the labour force participation rate will increase over the next few years, from its current rate of 62.3% to 64.5% in 2020 (Table 5.1). Labour force participation rate is expressed as the number of persons in the labour force (at work, looking for work and unemployed) as a percentage of the total population aged 15 and over. Wages are also improving against a backdrop of low inflation.

Table 5.1

Economic Outlook for Republic of Ireland 2018-2020			
	Percentage change		
	2018	2019	2020
GDP	3.2	4.3	0.8
Unemployment rate	6.1	5.2	5
Labour force participation rate	62.3	63	64.5
Retail sales	3.7	3.4	2.5

Source: *Trading Economics*

The Central Bank quarterly bulletin Jan 2018 notes that scope exists for growth in personal consumption in “staples” and “non-essential non-durable goods”. The former includes convenience goods and the latter includes leisure service expenditure. It bases this forecast on the fact that rates of growth on these items were appreciably higher in the pre-recession years (Table 5.2).

Table 5.2

Trends in Personal Consumption Expenditure (% change per annum)			
	1996-2007	2008-2013	2014-2016
Staple goods	3.9	-1.5	2.9
Non-essential non-durables	6.7	-1.3	2.8
Durable goods	11	-3.9	12.8

Source: *Central Bank Quarterly Bulletin, January 2018*

The expectation that expenditure on services will increase is supported by the latest 2016 census figures which indicate that the restaurant sector experienced the third highest growth of all sectors between 2011 and 2016 – an increase of over 10,000 jobs statewide.

Nonetheless, economic predictions typically come with health warnings connected to external factors. These relate to the impact of Brexit, corporate tax changes in the USA and the threat of global confrontation arising from import tariffs.

5.2 Market Analysis

Within the context of the national economic indicators above the market demand for economic space in the area of Clongriffin-Belmayne is considered below.

Retail space

Both Supervalu and the discount chains (Aldi and Lidl) are still investing in opening new stores. Three new Supervalu stores are planned to open in the Republic of Ireland in 2018. Lidl intends to increase its 154 stores to 200 within the next 5 years. Indeed, Lidl is building one in Ballymun. So too, Aldi is in the middle of a €100m expansion plan.

In the past few years there has been an increasing trend to develop small format convenience stores (e.g. Tesco Express) as the appeal for weekly, bulk-buy purchases from superstores has begun to wane. This is due a combination of factors, including: a declining household size (i.e. rise in one person households); preference for eating out and ordering food in; rise in petrol prices; growth of online shopping and competition from discount stores. Although larger sized foodstore proposals will undoubtedly continue to seize prime out of centre opportunities where they arise, the number of small format foodstores looks likely to increase in the future.

Current challenges for retailers relate to payment of rents, rates and service charges. Challenges in the future are likely to relate to competition from bigger centres and the growth in online shopping.

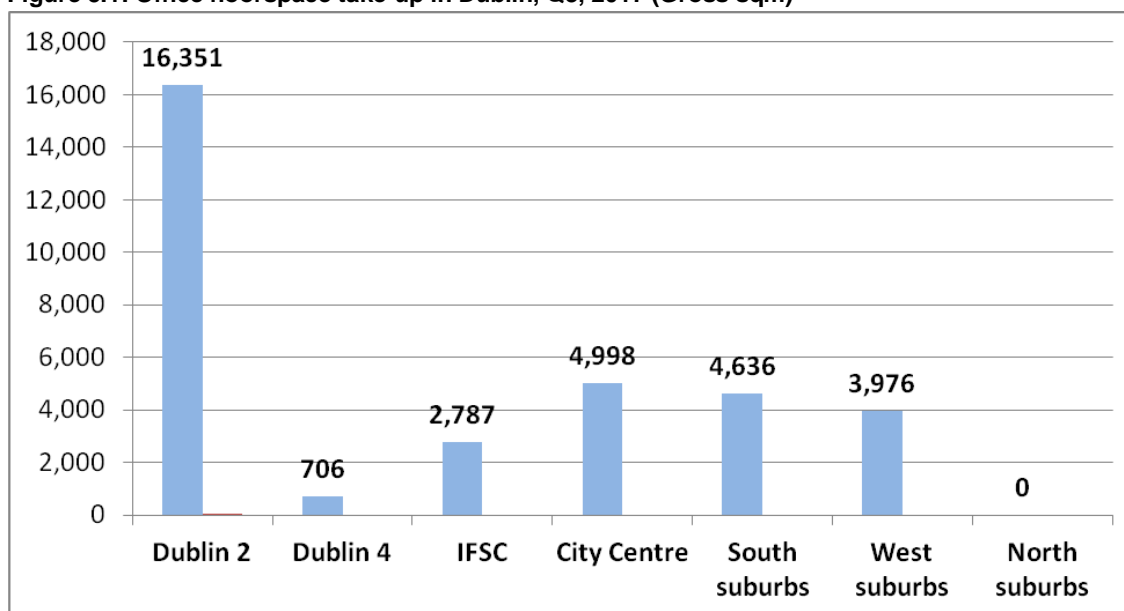
Save for premium locations on busy streets in Dublin City Centre Colliers expect rents to remain fairly flat elsewhere in the short term. On the plus side Colliers note that the investor market has diversified, with alternative forms of funding from insurance and non-Irish bank funding becoming available for investment.

Office space

Latest research into demand for office space in the area, as carried out by MurphyMulhall in its Market Matters Winter 2017 publication, indicates that there is little activity in the northern suburbs of Dublin, with the City Centre proving the main attraction (Figure 5.1). Nearly half of this demand is generated by end-users requiring units sized 5,000 sqft (465 sqm) and under, which the LAP area has an appreciable number of.

Rents in the area are very competitively priced (circa €20psf or €215psm) compared to the heights of €60 psf (€646 psm) requested of City Centre sites for Foreign Direct Investment (FDI). Upward pressure on rents elsewhere should make competitively priced locations like Clongriffin-Belmayne more attractive to indigenous businesses.

Added to the above, Colliers cite the potential for Brexit-related moves in the office sector as possibly opening up opportunities for locations such as this.

Figure 5.1: Office floorspace take-up in Dublin, Q3, 2017 (Gross sqm)

Source: MurphyMulhall, Market Matters, December 2017 publication

Services

Examination of the Household Budget Surveys for 2010 and 2016 reveal that expenditure in restaurants and cafes actually decreased during this period in line with other areas of consumer expenditure. However, the experience in the UK would suggest that demand for these types of services will grow in the near future. Leisure service uses are making an increasingly important contribution to the overall commercial functioning of cities, with many planning applications seeking to change from retail use to leisure service uses such as cafés, restaurants and gyms. For example, since it moved into the market four years ago coffee house chain Café Nero plans to open more stores in Ireland after profits nearly quadrupled at the chain.

While it is possible to predict that there will be real growth in expenditure on leisure service uses in the future it is less clear how this increase in spend will translate into development on the ground. Predicting future behavioural patterns is made difficult by fast moving changes in society and the vagaries of people's tastes and habits. Nonetheless, based on existing trends, a number of broad-brushed forecasts can be made. Eating out will continue to exert demand for restaurant/cafe and fast food floorspace given that it presently accounts for nearly 40 per cent of leisure service expenditure according to the HBS. In contrast, the drive towards adopting a healthier lifestyle augurs well for development of keep fit and personal health outlets. So too, in terms of leisure service expenditure, changes in drinking habits and an increase on online gambling will likely curtail the development of new pub and betting/gaming outlets respectively.

Primary Care Centre

The Health Service Executive (HSE) considers that the area is suitable for the development of a Primary Care Centre. At the time of print, it is exploring potential options at Clongriffin. Discussions with the HSE stress the importance of having good public transport links to the facility.

Library

The closest public library to the LAP area is located in Donaghmede. Access to two mobile library stops located at Clarehall and Belmayne is also provided to the community. Nonetheless, it is an objective of the LAP to: 'Assess the feasibility of providing a Dublin City Council Library facility to service the future population within the LAP area, include the feasibility within the next five year city library strategy and consider optimal locations that co-locate such a facility with other community uses'.

The Council's Library Services has indicated that this objective remains valid and that the feasibility of providing a library at Clongriffin – Belmayne will be an objective of its next Library Development Plan.

Multipurpose Community Resource Centre

At the consultation workshop reference was made to the need for a multipurpose community resource centre capable of facilitating the needs of a range of organisations. "The Junction", a new community resource centre, opened in May 2018, at Station Square, Clongriffin. The premises have been made available by Gannon Homes, and the operation of the centre is being managed by Dublin City Council.

Enterprise units

The LAP area is in close proximity to neighbouring industrial/business areas at Malahide Road and Newtown Roads, Clonsaugh and Baldoyle. Based on a cursory review of unit availability on the web and on the ground it would appear that there is adequate spare capacity at these locations. It is arguable therefore that this should be sufficient to cater for any demand for enterprise and start up space from the growing population base at Clongriffin-Belmayne.

Future development planned for Fingal

Fingal County Council has identified 2 adjoining masterplan sites, located near the M1/M50 Interchange at Clonsaugh, a short distance west of the LAP. These lands are zoned for 'High Technology', which is to provide for office, research and development, and high technology employment. In addition, Fingal County Council intends to prepare a Local Area Plan for Dublin Airport.

5.3 SWOC analysis

An overarching appraisal of the strengths and weaknesses of the Clongriffin-Belmayne area was carried out in order to inform the capacity assessment. This research and analysis was assisted by the feedback from the stakeholder workshop convened in January 2018. The SWOC analysis helped highlight the possibilities and limitations for economic and retail development in the area. The findings are summarised in Table 5.3 and expanded upon below.

Strengths

The key strengths of the area relate primarily to its infrastructure and accessibility. Clongriffin-Belmayne is equipped with its own DART station on its eastern edge and a major road intersection (Belmayne/Northern Cross) on its western side. The construction of the DART station was developer-funded and provides a regular train service south to the City Centre and north to the amenities of the countryside and coast at Portmarnock and Malahide. There has been significant private investment in the vicinity of this train station. This includes the creation of Station Square and an office/retail hub (albeit currently vacant) to facilitate commercial and retail opportunities for this new urban community. Public investment in infrastructure in the area includes surface water and wastewater infrastructure, and significant green infrastructure such as Fr. Collins Park.

Located approximately 10-15 minutes drive from Dublin Airport the appeal of the Belmayne/Northern Cross road intersection for commercial development is reflected in the presence of the Hilton Hotel and the location of firms such as Bewleys in the neighbouring City Business Park. As stated previously, approximately 39,000 vehicles per day travel on the M50 / M1 Link / Grange Road (R139).

As a location targeted for major residential expansion the youthful population profile of the area, where a quarter of the population is under 15, can be acknowledged as a resource for the future. So too, it should not be understated that there is a growing sense of community identity in the area, as exemplified by the holding of a regular market at Station Square. The latter is an initiative by the main developer in this area.

Table 5.3

Strengths of Belmayne/Clongriffin
Recipient of Significant amount of public & private investment
Proximity to Dublin Airport (Tourism and Employment)
Proximity to Coast/Countryside & QBC to City Centre
Youthful population
DART station
High level of passing consumer traffic (Northern Cross junction)
Growing sense of community identity
Weaknesses of Belmayne/Clongriffin
Unfinished development
Poor connectivity
Vacancies in the Belmayne and Clongriffin nodes of the Key District Centre
Relatively low socio-economic profile
Relative lack of commercial visibility & accessibility at Clongriffin
Opportunities in Belmayne/Clongriffin
Key development land in Council ownership
Targeted for significant residential expansion
Potential for non-residential development (PCC, Library, Hotel, Supermarket)
Constraints in Belmayne/Clongriffin
Railway line, Regional Rds & River Mayne - barriers to connectivity
Competition from established centres
Current lack of market appeal
Location at Council interface

Weaknesses

With the economic downturn commencing in 2007/2008 parts of this planned urban expansion have yet to be delivered on the ground. Undeveloped sites and an incomplete internal road network (Figure 5.2) have given rise to poor connectivity/accessibility and this partly explains the abnormal level of vacant floorspace evident in this area. With the exception of the Clarehall Shopping Centre site, over 60% of the units and floorspace in the LAP area are vacant (see Section 3.0 earlier). This rate of vacancy contrasts sharply with the average of 18.7% for the wider Dublin 17 area and 13.6% for Dublin County as a whole.⁷

Linked to the above, the Clongriffin part of the Key District Centre suffers from a lack of commercial visibility. It is out of sight of the surrounding regional roads (R107 and R139) and some participants at the workshop commented that there was a perceived sense of isolation here.

According to the census 2016 findings it would appear that the area has a lower socio-economic profile when compared to the rest of Dublin City. The most telling indicator of this is the census recording that 11% of workers belong to the professional occupations against an average of 21% for Dublin City Council (DCC) as a whole.

⁷ GEOVIEW Commercial Vacancy Rates Q2 2017, GEODIRECTORY database, 9/07/2017

Figure 5.2: Main Street awaiting connection with Northern Cross in background



Opportunities

Bearing in mind that land assembly/acquisition can often protract and frustrate the delivery of major development projects the public ownership of much of the Study lands (circa 17 hectares) at Belmayne/Belcamp Lane affords a significant investment opportunity for the area.

Figure 5.3: Substantial Council land at Belcamp Lane, SW Quadrant of Belmayne KDC



The population of the area is set to grow significantly over the next twenty years and this will help bolster consumer expenditure in the area. There is currently a healthy market for houses and apartments in the area.

Added to the above, government funding has been secured by Dublin City Council for the completion of Main Street, running from New Priory westward to Malahide Road under the Local Infrastructure Housing Activation Fund (LIHAF). The design of this route is currently underway. When complete, the route will link Malahide Road to Clongriffin train station for public transport.

Moreover, the potential for non-residential development in the area can be gauged from the number of extant permissions in the area. There is permission for a hotel, supermarket and gym at Clongriffin KDC,

as well as a Multi Use Games Area (MUGA) at Belmayne. Expressions of interest also exist to open a Primary Care Centre (PCC) and library in the area.

Constraints

In some respects the surrounding transport network is a double edged sword in that it ostensibly heightens accessibility while equally acting as a constraint to connectivity. To the east there is the divisive nature of the railway line, which has resulted in LIHAF funding to improve bridging connectivity. This funding has been secured by Fingal County Council to provide ramped pedestrian and cycle access to Clongriffin Train Station. The regional road network to the west and south, particularly the Malahide Road junction, is a constraint to fostering linkages with established communities. Finally, while the River Mayne to the north possesses potential for a linear park/riparian corridor it also serves as a physical barrier to road improvements.

The desire to develop a purpose-built KDC in Clongriffin-Belmayne faces competition from existing centres that have long established trading patterns and market shares. For example, the household survey highlighted the pervasive sphere of influence of Donaghmede Shopping Centre in the area.

While the area benefits from relatively close proximity to Dublin Airport it lacks doorstep proximity to the M50 and, as a fringe location, is furthest removed from the City Centre. Viewed in this context, it is always going to be a challenge to secure major business investment by multinationals. Recent market activity points to the preference for foreign direct investment to locate in the City Centre.

Finally, while collaboration with other Councils can advance a holistic approach to proper planning and sustainable development, DCC's boundary interface with Fingal to the north and east introduces an added layer of administration in terms of the co-operation and co-ordination required to fulfill development objectives.

5.4 Comparative analysis with other District Centres

In many respects, the scale and nature of this residential project in Dublin makes it quite unique, in terms of being able to draw comparisons with similar initiatives elsewhere. Indeed, the best comparators are similar schemes in Dublin such as Cherrywood. However, Cherrywood is in the early stages of development and therefore limited in providing best practice advice. Furthermore, many district centres tend to be associated with purpose-built shopping complexes, as opposed to the commercial nodes and connecting main street evident at Clongriffin-Belmayne. In this regard, Clongriffin-Belmayne is quite distinct in that it seeks to cultivate a strong sense of place, based on high quality public realm, fine grain streetscapes and creative design.

Examination of case studies and examples of best practice, including regeneration work carried out by AECOM, allowed for the distillation of key messages for this study. In particular, the experience of District Centres in Sheffield (Darnall and Spital), Manchester (Chorlton) and London (Haringey and Park Royal) cast light on a common approach to planning for District Centres.

While each district centre has its own unique challenges there are essentially two core themes that underpin the approach of local government to district centre development.

Firstly, it is recognised that the promotion of retailing comprises only one strand of a multifaceted approach to the development of a District Centre.

Secondly, planning for retail and economic development is allied to public realm enhancements and improved management of the area. Attention is placed on: (i) environmental improvements & public realm enhancements; (ii) greening and cleaning the area; and (iii) increased security, including improved lighting and policing. Ultimately, the maintenance of a safe, clean environment generates a feel-good factor and encourages people to trade locally.

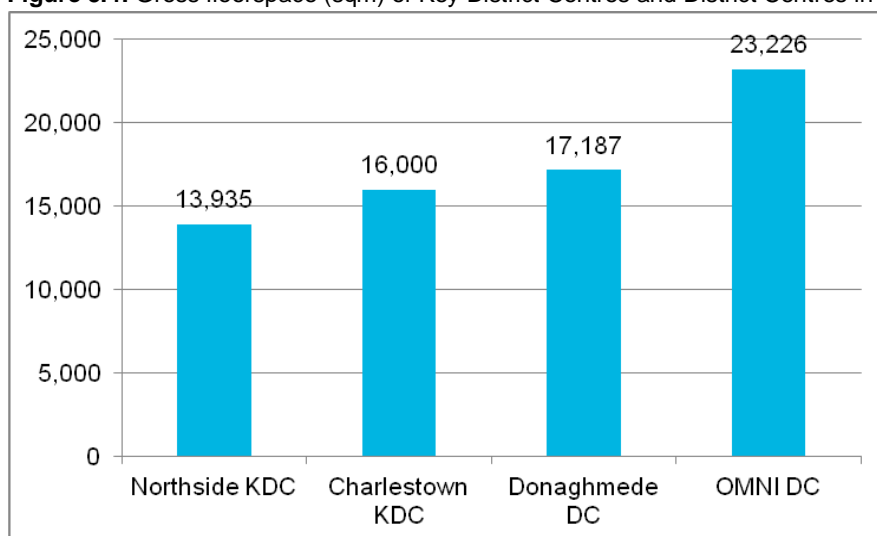
In terms of retailing specifically, a number of consistent messages can be distilled from experience elsewhere, the key ones of which are relevant to Clongriffin/Belmayne. These include the following:

- Emphasis is on retaining expenditure on convenience goods within the District Centre catchment as a means of bolstering retail trade in general.
- Most expenditure on comparison goods tends to leak to large centres elsewhere, particularly town centres and large out of centre retail locations.
- Focus is on promoting the distinctiveness of the area, in terms of supporting the independent sector. The Sunday market initiative at Clongriffin is an example of this approach.

Size of Key District Centres & District Centres in North Dublin

A useful frame of reference for estimating the appropriate scale of the Key District Centre (KDC) for Clongriffin-Belmayne is the size of other KDCs and District Centres (DCs) in North Dublin. As acknowledged in Section 3.0 many District Centres are essentially purpose-built shopping centres. The gross floor areas of KDCs and DCs in North Dublin are shown below in Figure 5.4. The largest District Centre is OMNI at 23,226 gross sqm while the smallest is Northside Key District Centre at 13,935 gross sqm. It is interesting to note that the level of retailing at the Clarehall Shopping Centre site (22,167 gross sqm in Section 3.0 earlier) is on a par with that at OMNI.

Figure 5.4: Gross floorspace (sqm) of Key District Centres and District Centres in North Dublin

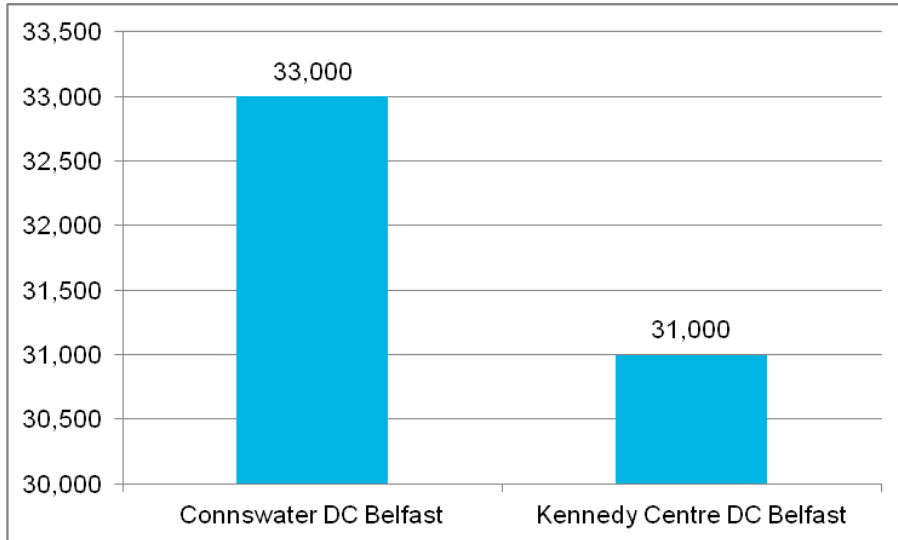


Size of District Centres in Belfast

In addition to the above, it is also useful to consider the size of District Centres in Belfast as the second largest population centre on the island (Figure 5.5). Direct comparisons with District Centres in England are distorted by the higher population density levels observed in these locations, which are typically three times those in Ireland.

The two largest District Centres in Belfast are the Connswater Shopping Centre (33,000 sqm) and Kennedy Centre (31,000 sqm), which serve east and west Belfast respectively. The Kennedy Centre in particular possesses a wide range of uses. All 7 District Centres in Belfast are purpose-built shopping centres.

Figure 5.5: Gross floorspace (sqm) of 2 largest District Centres in Belfast



The size of District Centres in Belfast and in North Dublin can help identify the broad floorspace parameters for Clongriffin-Belmayne KDC, which would appear to range between 13,000 and 33,000 gross sqm.

5.5 Conclusion

At present, economic conditions bode well for significant residential and non-residential development at Belmayne/Clongriffin. It is against this background that the scale and mix of potential economic and retail uses is considered in greater detail in subsequent sections of this Study.

The top left corner of the page features three intersecting black lines. One line is horizontal, another is diagonal with a steep positive slope, and the third is diagonal with a steep negative slope. They intersect to form a triangular shape.

Retail floorspace projections

06

6.0 Retail Floorspace Projections

6.0 Introduction

This section of the Study details a retail supply and demand analysis of retail floorspace requirements in Clongriffin-Belmayne KDC in the foreseeable future. This is principally carried out for the purpose of advising how much retail floorspace should be allocated to undeveloped lands at the Belmayne KDC. This is to inform the Masterplan for this area. It is important to note from the outset that the projected retail floorspace requirements in this section refer to the overall retail floorspace capacity for the LAP area. In this regard they also include all existing floorspace (occupied and vacant) and permitted floorspace. Moreover, it is also important to emphasize that the retail floorspace requirement figures are advisory in nature and are not intended to serve as prescriptive floorspace caps by which to inhibit competition.

The analysis involves examination of the following factors:

- Retail catchment;
- Expenditure levels;
- Turnover forecasts (sales densities);
- Impact from internet shopping;
- Shopping patterns from survey.

In relation to the surveyed shopping patterns, the results of the household survey yielded localised data relating to:

- weekly expenditure levels on grocery items;
- the market share of retailers;
- the proportion of consumer leakage from the area; and
- public demand for more shopping provision.

All of this information is useful in substantiating assumptions for the assessment of retail floorspace need in Clongriffin-Belmayne.

6.1 Retail catchment

For the purposes of this Study the primary retail catchment of Clongriffin-Belmayne is assumed to include the population within the LAP boundary (**9,589 persons in 2016**). This is based on the understanding that the proposed Key District Centre floorspace is intended to cater for the retail and employment needs of this new community. The population in the adjoining areas at Balgriffin, Belcamp and Baldoyle in Fingal County Council (**3,977 persons in 2016**) will also be considered for sensitivity testing, given that Clongriffin-Belmayne is the nearest Key District Centre to these areas. The population in these areas is summarised in Table 6.1, with a detailed breakdown provided earlier in Section 3.7.

Table 6.1

Existing & proposed population in adjacent Fingal lands				
	Baldoyle	Belcamp	Balgriffin	Total
Existing 2016/2017	2,335	49	1,593	3,977
Proposed	1,518	909	854	3,281
			Total	7,257

Source: Fingal County Council 2017 House Count

6.2 Approach to projecting floorspace need

In the interest of adopting a flexible approach to statistical forecasting, a range of retail floorspace projections for both convenience goods shopping and comparison goods shopping is considered. A range allows for the estimation of a low and high floorspace requirement.

As far as Clongriffin-Belmayne is concerned the low case scenario concentrates the analysis purely on projected population levels within the LAP area alone. Although it is recognised that administrative boundaries do not necessarily correspond with shopper catchments, it is reasonable to contend that, at the very least, Clongriffin-Belmayne is entitled to compete for a share of shopping expenditure generated by the population within its own LAP boundary. A high case scenario for Clongriffin-Belmayne takes into account existing and permitted residential development in neighbouring Fingal. As explained above these adjacent lands are at Balgriffin, Belcamp and Baldoyle.

Although the Clarehall Shopping Centre site is included within the LAP boundary it has a sub-regional appeal which extends beyond its Key District Centre role, due principally to the presence of the Tesco Extra store. Accordingly, the large footprint of the Clarehall Shopping Centre site, which includes the adjacent parade of retail units, would have a disproportionate impact on floorspace capacity calculations at the Key District Centre level. Therefore, while the expenditure of LAP residents to this retail location is factored into the assessment it is considered unreasonable, for fear of irrationally skewing floorspace projections, to attach substantive weight to the scale of floorspace located here.

It is important to reiterate that the floorspace projections are not intended to function as floorspace caps on future development. Rather, as documented in section 3.6 of the 2012 Retail Planning Guidelines, the floorspace estimates are intended to provide broad guidance on floorspace need and should not serve to inhibit competition.

6.3 Retail expenditure

Information at the national level exists for various categories of consumer expenditure; however there is no definitive aggregate breakdown for expenditure on convenience goods and comparison goods.

Despite this shortcoming, the regularity of expenditure on groceries means that a reasonable estimate can often be made for convenience goods shopping. However, given the irregular, leisure based dimension to the purchase of comparison goods, together with the blurring of the lines between providing a service and selling products, the amount of money spent on these items is more difficult to estimate and subject to varying interpretations.

Expenditure on Convenience goods

One of the most up to date sources of consumer expenditure is the 2016 Household Budget Survey (HBS). It provides a detailed list of expenditure on items per household, which can then be classified into categories of convenience goods and comparison goods (Appendix 6.1). Based on this classification and taking into account the average household size recorded in the HBS (2.78 for the State) it is estimated that the average person spent €2,459 on convenience goods in 2016. This equates to €47 per week. Figures extrapolated from the Retail Strategy for the GDA point to a similar annual expenditure on convenience

goods in 2016 of €2,463, which also equates to €47 per week. The findings of the household survey were broadly in keeping with these expenditure estimates.

Expenditure on Comparison goods

While the household survey yielded useful information on comparison goods shopping as a whole, surveys have historically demonstrated that the specific retrieval of expenditure information on comparison goods shopping is very difficult to achieve and prone to inconsistent responses. For these reasons it was not explicitly asked as part of the household survey in Clongriffin-Belmayne. Instead, the level of expenditure for these goods was likewise based on a figure extrapolated from the Household Budget Survey (Appendix 6.1). It recorded expenditure at €1,938 per head per year, which is inclusive of online spend. This is well below the per capita figure recorded in the Retail Strategy for the GDA (€3,240 in 2007) but can be explained by the fact that the HBS figure excludes expenditure on retail services and leisure services, which are considered separately in Section 7.0 of this Study. Expenditure on retail and leisure services tends to be classified as comparison goods by most studies when arriving at an expenditure figure for such items.

Notwithstanding the latter qualification reference to other sources of expenditure, including the National Income and Expenditure Report 2016, would suggest that expenditure on both convenience and comparison could actually be higher than that recorded in the HBS. However, the conservative HBS figures are appropriate to use in this Study from a precautionary perspective, given the level of vacancies evident in the area. Their use is also justified in light of their detailed breakdown, which is lacking in other sources on expenditure, and in view of the household survey findings for convenience goods expenditure, which correspond quite well with HBS findings.

Annual growth in expenditure

When projecting the above expenditure per capita figures for the foreseeable future it is necessary to consider published growth forecasts.

Latest indicators from the National Income and Expenditure Report 2016 would suggest that expenditure on convenience and comparison goods is increasing. Table 6.2 reveals that between 2010 and 2016 expenditure on convenience goods grew by 1.41% per annum, while expenditure on comparison goods such as clothing, footwear and household durables grew between 3.73 and 5.34% per annum. Viewed in the light of these trends real growth in expenditure up to the year 2027 is estimated at 1% per annum for convenience goods and 4.5% per annum for comparison goods. The latter 4.5% figure is the average of the two preceding figures (3.73% and 5.34%) for comparison goods. It is also benchmarked against a 3% per annum UK prediction sourced from Figure 2 in Retail Planner Briefing Note 15 by Experian and Oxford Economics (Appendix 6.2).

Table 6.2

Expenditure category	Annual change 2010-2016*	Annual real change to exclude effect of population increase (0.8% per annum) #
Food (Convenience goods)	2.21	1.41
Non-alcoholic Beverages	7.75	6.95
Alcoholic beverages (total incl pubs)	0.22	-0.58
Tobacco	-5.19	-5.99
Clothing and footwear (Comparison)	4.53	3.73
Housing	-0.67	-1.47
Fuel and Power	-1.62	-2.42
Household equip't & operation (Comparison)	6.14	5.34
Transport and communication	3.29	2.49
Recreation, entertainment and education	-0.82	-1.62
Miscellaneous goods and services	2.00	1.20
Expenditure outside the State	-0.54	-1.34
Expenditure by non-residents	6.11	5.31
Personal consumption of goods and services	1.04	0.24
* Extrapolated from Table 14.1 of National Income & Expenditure Report 2016		
# based on annual growth recorded during 2011-2016 censal period		

6.4 Turnover

Apart from published turnover results for selected multiple chains, as detailed in company listings, there is no authoritative source on turnover information in Ireland and Britain. It is a serious statistical deficiency that undermines the reliability of retail floorspace projections across the board.

Notwithstanding this shortcoming, the Retail Strategy for the GDA estimates turnover ratios achieved by shops at circa €12,000 per net sqm for convenience goods and circa €9,000 per net sqm for comparison goods. It is questionable whether such turnover ratios (sales densities) are applicable to a fringe location such as Clongriffin-Belmayne. Latest figures for the UK (see Figures 4a and 4b in Briefing Note 15 – Appendix 6.3) predict average turnover rates at circa £9,000 (€10,300) and £5,000 (€5,700) per net sqm. Accordingly, respective sales densities of €10,000 per sq m (convenience) and €6,000 per sq m (comparison) have been adopted for forecasting purposes. These figures are also indicative of minimum turnover estimates contained in other retail strategies in the Republic of Ireland.

6.5 Impact from internet shopping

In theory the growth of online shopping would imply that the need for the physical development of retail floorspace on the ground should decline at a corresponding rate. Eurostat data for Ireland indicates that 8% of people shopped online for some of their convenience goods in 2016 – more than twice the rate of 3% in 2008. More significantly, however, the percentage for clothes and footwear was as high as 61% in 2016. A note of caution needs to be exercised here because the Eurostat data records any incidence of online shopping as opposed to most shopping on the internet. The household survey revealed that 13% of people carry out most of their shopping for comparison goods online.

Latest research from Britain indicates that online shopping could account for nearly a quarter of comparison goods shopping and a fifth of convenience good shopping by the mid 2030s (Figure 5 in Appendix 6.4). However, it is estimated that the majority of online shopping for convenience goods will still involve deliveries from existing retail stores as opposed to direct dispatch from distribution warehouses. In relation to comparison goods shopping, the reverse will be the case, in that most online comparison goods shopping will be sourced directly from the warehouse.

Viewed in the context of the above, it is reasonable to assume that the majority of convenience goods sales (95.3% from Figure 5 in Appendix 6.4) will continue to be sourced from shops in the area by the year 2027. On the other hand, given that online shopping for comparison goods featured highly in the survey, as per national trends, it is reasonable to predict that a growing element of this type of expenditure will not find its way into shops. It can therefore be inferred from the above mentioned sources that 82.4% of comparison goods shopping will take place in shops by the year 2027, with the balance (17.6%) coming in the form of pure online transactions.

6.6 Shopping patterns

The household survey of the Clongriffin-Belmayne area yielded invaluable information on shopping patterns which helped underpin integral assumptions for floorspace projections in this assessment.

The most significant finding to emerge from the household survey was the huge level of consumer leakage from the area to competing centres in neighbouring areas. In many respects, this is not surprising given the relative lack of retail facilities in the area outside of the Clarehall Shopping Centre site, as well as the convenient accessibility of centres such as Donaghmede.

Related to the above, the survey findings also indicated a desire by the people for the provision of additional shopping facilities.

6.7 Assessment of retail floorspace need

Taking into account the above considerations it is possible to estimate the capacity of Clongriffin-Belmayne to accommodate retail development for a target population up to the year 2027 for both convenience goods and comparison goods.

As explained previously, a low floorspace requirement is based on expenditure generated within the LAP area alone, while a high floorspace requirement also includes expenditure generated by existing and permitted housing in adjoining parts of Fingal County Council.

(i) Convenience Goods

Low floorspace requirement

The following assumptions are made for a low floorspace assessment:

- The number of persons in the LAP area could increase significantly from its current 9,589 figure to 26,518 by the year 2027.
- The expenditure per capita figure in 2016 amounted to €2,459, which approximates to €47 per head per week. This is derived from the 2016 Household Budget Survey and is corroborated by the findings of the household survey in Clongriffin-Belmayne.
- Real growth in expenditure on convenience goods is forecast to grow by 1% per annum to give a per capita expenditure figure of €2,744 in 2027.
- Total expenditure is reduced to reflect the contribution of grocery items bought online and delivered from warehouses as opposed to shops (1% in 2016 and 4.7% in 2027)
- The outflow of expenditure on convenience goods from the LAP is assumed to be 40%. This is based on the understanding that the area is entitled to capture the majority of local grocery spending (i.e. the 60% balance). This 40% figure is inclusive of the proportion of trade captured by Tesco Clarehall, which was 13% according to the household survey.
- The annual turnover of new convenience goods floorspace will approximate to €10,000 per net sqm.

Based upon the above considerations it is shown in Table 6.3 that the LAP area could accommodate a total of **4,160 net sqm** of convenience goods floorspace by 2027. Some of this floorspace already exists (e.g. Eurospar and Centra), as well as a vacant supermarket and extant permission for another supermarket at Clongriffin. Their impact on the capacity findings will be considered later in the Section 8.0 of this Study.

Table 6.3

CAPACITY ANALYSIS FOR RETAIL FLOORSPACE CONVENIENCE GOODS (LAP population only)		
	2016	2027
Population	9,589	26,518
Expenditure per capita	€2,459	€2,744
Total expenditure less that spent online*	€23,343,774	€69,335,235
Adjusted for 40% outflow to other centres (including Clarehall)	€14,006,265	€41,601,141
Floorspace capacity based on estimated turnover of €10,000 psm #	1,401	4,160
* Pure online shopping for groceries (1% in 2016 & 4.7% in 2027)		
# Capacity figures are inclusive of all existing and vacant floorspace		

High floorspace requirement

When the above exercise is reworked in Table 6.4 on the basis of higher population figures that include the immediate population in adjoining Fingal lands (33,775 persons in 2027) the floorspace capacity for convenience goods increases to **5,299 net sq m**.

Table 6.4

CAPACITY ANALYSIS FOR RETAIL FLOORSPACE CONVENIENCE GOODS (LAP + adjacent Fingal population)		
	2016	2027
Population	13,565	33,775
Expenditure per capita in shops	€2,459	€2,744
Total expenditure less that spent online*	€33,024,825	€88,310,127
Adjusted for 40% outflow to other centres (including Clarehall)	€19,814,894.93	€52,986,076.20
Floorspace capacity based on estimated turnover of €10,000 psm #	1,981	5,299
* Pure online shopping for groceries (1% in 2016 & 4.7% in 2027)		
# Capacity figures are inclusive of all existing and vacant floorspace		

Overall, therefore, it is estimated that there is capacity to accommodate a total of **4,160 to 5,299 net sqm** of convenience goods floorspace in Clongriffin-Belmayne by 2027.

(ii) Comparison goods

The same low and high forecasting approach to the assessment of floorspace need can be undertaken for comparison goods shopping.

Low floorspace requirement

The following assumptions are made in the assessment:

- The number of persons in the LAP area could increase significantly from its current 9,589 figure to 26,518 by the year 2027.
- The expenditure per capita figure in 2016 amounted to €1,938 based on the Household Budget Survey. This figure is considerably lower than the comparable figure quoted in the GDA Retail Strategy. This is mainly because it excludes related expenditure on services (retail & leisure), which is often subsumed as part of comparison goods expenditure. As previously noted, this Study considers expenditure on services in the Section 7.0.
- Real growth in expenditure on comparison goods will be in the region of 4.5% per annum. Taking this growth rate on board it is estimated that, by the year 2027, expenditure per head on comparison goods will be €3,145.
- The total expenditure figures for 2016 and 2027 are reduced to allow for online transactions (13.5% and 17.6% of expenditure respectively).
- The outflow of expenditure on comparison goods from Clongriffin-Belmayne is estimated at 60%. This level of outflow is in recognition of the attraction of Dublin City Centre and other large retail centres for this type of shopping, as noted in the household survey. The outflow figure also takes into account the trade captured by the Clarehall Shopping Centre site, as recorded by the household survey.
- The turnover of new comparison goods floorspace will approximate to €6,000 per net sqm.

Based upon the above considerations Table 6.5 shows that **at least 4,582 net sqm** of comparison goods floorspace could be accommodated in Clongriffin-Belmayne by the year 2027.

Table 6.5

CAPACITY ANALYSIS FOR RETAIL FLOORSPACE		
COMPARISON GOODS (LAP population only)		
	2016	2027
Population	9,589	26,518
Expenditure per capita	€1,938	€3,145
Total expenditure less that spent online*	€16,074,112	€68,723,836
Adjusted for 60% outflow to City Centre and other large centres (including Clarehall)	€6,429,645	€27,489,534
Floorspace capacity based on estimated turnover of €6,000 psm #	1,072	4,582
* Pure online shopping for comparison goods (13.5% in 2016 & 17.6% in 2027)		
# Capacity figures are inclusive of all existing and vacant floorspace		

High floorspace requirement

When the above exercise is repeated on the basis of higher population figures, that include the population of adjoining Fingal lands, the capacity increases to **5,835 net sqm** (Table 6.6).

Overall, therefore, it is estimated that there is capacity to accommodate between **4,582 and 5,835 net sqm** of comparison goods floorspace in Clongriffin-Belmayne by 2027.

Table 6.6

CAPACITY ANALYSIS FOR RETAIL FLOORSPACE		
COMPARISON GOODS (LAP + adjacent Fingal population)		
	2016	2027
Population	13,565	33,775
Expenditure per capita	€1,938	€3,145
Total expenditure less that spent online*	€22,740,313	€87,531,408
Adjusted for 60% outflow to City Centre and other large centres (including Clarehall)	€9,096,125	€35,012,563
Floorspace capacity based on estimated turnover of €6,000 psm #	1,516	5,835
* Pure online shopping for comparison goods (13.5% in 2016 & 17.6% in 2027)		
# Capacity figures are inclusive of all existing and vacant floorspace		

6.8 Benchmarking findings against the Retail Strategy for the GDA

Although somewhat dated the Retail Strategy for the GDA 2008-2016 represents the most comprehensive quantification of retail floorspace across Dublin. It provides a detailed breakdown of the amount of convenience and comparison goods floorspace for northeast (NE) Dublin, which includes the subject area. When the level of floorspace in NE Dublin is measured against the population found there a rate of floorspace per capita can be calculated (Table 6.7). The application of these floorspace per capita rates to the projected population in the LAP suggests that in the region of 4,243 net sqm of convenience

floorspace is required. This figure is not unlike the low capacity figure estimated in Table 6.3 above (4,160 net sqm).

As for comparison goods, the application of the floorspace per capita rate to the LAP population produces a figure of 7,160 net sqm in Table 6.7. This is somewhat higher than the 4,582 net sqm capacity figure estimated in Table 6.5. This difference could be explained by the fact that the Retail Strategy per capita figure includes the large floor areas of retail warehouses, which are not characteristic of the LAP area. This difference notwithstanding this benchmarking exercise still provides a useful validation check for the retail floorspace forecasts in this Study.

Table 6.7

Estimated retail floorspace capacity in LAP by 2027 based on floorspace per head of population recorded in Retail Strategy for GDA		
	Convenience goods	Comparison goods
Floorspace per head*	0.16m ²	0.27 m ²
Projected population#	26,518	26,518
Floorspace required	4,243 m ²	7,160 m ²
<i>* as recorded in GDA Retail Strategy for Northeast Dublin</i>		
<i># based on projected population in LAP only</i>		

6.9 Conclusion

This retail assessment has outlined the capacity of the area to accommodate convenience and comparison floorspace up to the year 2027. This is 4,160-5,299 net sqm for convenience goods shopping and 4,582-5,835 net sqm for comparison goods shopping (Table 6.8).

Table 6.8: Retail Floorspace Projections for Clongriffin/Belmayne KDC 2027

Floorspace Category		Net sqm
Convenience Goods	Low	4,160
	High	5,299
Comparison goods	Low	4,582
	High	5,835

These capacity figures will be balanced against the amount of existing, vacant and permitted build in the area in Section 8.0, when matters relating to the scale, form and location of this floorspace are considered as part of strategic guidance for the area.



**Economic uses
capacity assessment**

07

7.0 Economic uses capacity assessment

7.0 Introduction

This section of the Study considers the capacity for other economic uses that could be developed alongside the projected retail floorspace requirements outlined in Section 6.0. For the most part these can be described as service uses, including retail services, leisure services and financial and professional services.

Retail services refer to businesses whose primary trade is the retailing of a service and/or hiring of goods, such as hairdressing and dry cleaners.

Leisure service uses are very much service and activity based. They are chiefly associated with the restaurant and drink trade, entertainment and keeping fit.

Financial and professional services include bank branches, building society branches, solicitor's offices, auctioneers, etc. This Study is primarily concerned with estimating floorspace requirements for these own-door financial and professional service uses that interact with the public and which are typically found in shopping/commercial areas. This is because the proportion of floorspace that they account for in District Centres can be gleaned from floorspace surveys of town centres and district centres carried out in the UK.

Office development that does not provide a direct service to the public and which does not actively engage with the public at street level does not form part of the floorspace projections in this Study. These offices are usually larger in size, more back-room in profile and less reliant on the need for commercial visibility. The market for these types of offices, which is most keenly linked to foreign direct investment, was examined in Section 5.0 of this Study.

7.1 Expenditure on economic (service) uses

While sufficient indices exist to formulate a broad supply and demand analysis for the sale of retail goods (i.e. convenience and comparison items) the same cannot be said for service uses. The absence of standardized sales density figures (turnover data) for the wide range of services considered militates against this. Notwithstanding this shortcoming, it is possible to give an indication of the expenditure on service uses, from which future capacity for growth can be inferred. Unfortunately, expenditure on financial and professional services suffers from a lack of reliable data.

Retail and leisure service uses differ from retail uses in that they primarily sell a service as opposed to a product. Their respective uses are itemized below.

Retail service

Retail service refers to the following uses:

- Hairdressers & personal care
- Dry cleaners
- Travel agents

Repair shops
 Post offices
 Opticians
 Photographic services
 Vet services

Leisure service

Leisure service refers to the following uses:

Restaurants/cafes/fast food takeaways – eating out
 Public houses/bars/clubs – socialising with a drink
 Cinema, theatres and concert halls – entertainment
 Betting offices, gaming centres, bingo – gambling
 Gyms, leisure centres, swimming venues – recreation

According to the Household Budget Survey 2016 it is estimated that annual expenditure on retail and leisure services amounted to €1,258 per head of population (Table 7.1). The same table also shows that this amount of money (€1,258) is well below that spent per head on shopping overall (€4,397).

Table 7.1

Annual per capita expenditure on service uses relative to retail expenditure 2016	
	Expenditure per head 2016
Retail service	€178
Leisure service	€1,080
Services Subtotal	€1,258
Convenience goods retailing	€2,459
Comparison goods retailing	€1,938
Retail Subtotal	€4,397
Total	€5,655
<i>Source: Extrapolated from Household Budget Survey 2016</i>	

A detailed breakdown of expenditure per head on service uses is contained in Table 7.2. It can be seen that eating out accounts for the largest proportion of service expenditure (39.1%) followed by recreation/keeping fit (21.1%), socializing with a drink (15%) and hairdressing/personal care (7.8%).

Table 7.2

Breakdown of expenditure on Service Uses 2016			
	Service category	Expenditure per capita	%
Retail Service	Hairdressers & personal care	€98.20	7.8%
	Dry cleaners	€8.23	0.7%
	Travel agents	€0.75	0.1%
	Repair shops	€3.18	0.3%
	Post offices	€15.53	1.2%
	Opticians	€14.59	1.2%
	TV/DVD Rental	€0.94	0.1%
	Photographic services	€7.48	0.6%
	Vet services	€29.18	2.3%
	Subtotal	€178.07	14.2%
Leisure service	Meals out	€491.38	39.1%
	Drinks out	€188.17	15.0%
	Entertainment	€68.65	5.5%
	Game of chance	€66.40	5.3%
	Recreation/keeping fit	€265.24	21.1%
	Subtotal	€1,079.84	85.8%
	Total	€1,258	100%

Source: Extrapolated from Household Budget Survey 2016

Compared to UK figures the amount of money spent on service uses would appear to have appreciable scope to increase. Bespoke Experian data obtained by AECOM for Belfast in 2017 pointed to an average of £2,000 per head (€2,270) being spent on service uses in 2016, compared to the €1,258 HBS figure recorded above. A significant part of this difference can be attributed to the larger amount of money spent eating out in the UK – which is more than twice that figure recorded in the HBS in the Republic of Ireland. It would appear therefore, based on trends in the UK that this branch of service use is likely to expand in the Republic of Ireland in the foreseeable future.

7.2 Projected quantum and mix of economic (service) uses

In contrast to projections on retail floorspace need there is no standard technique by which to estimate the quantum of economic floorspace considered appropriate for development in this LAP area. Indeed, most studies of this type solely focus on forecasting the capacity for retail floorspace because retail turnover estimates exist by which to translate expenditure levels into floorspace requirements.

In the absence of a standard methodology, the capacity for economic floorspace can be estimated on the basis of employment densities and this is considered below.

Projected floorspace capacity based on employment densities

Examination of employment density information, i.e. the number of workers per net sqm, can also assist with the capacity assessment for economic uses. **It is important to note that retail floorspace is also considered here because it is grouped with economic uses in the census, namely under the category “commerce and trade”.**

Employment density guidance from the Home and Communities Agency in the UK, dated 2015, estimates that a full time equivalent (FTE) job in the retail, service and financial/professional sectors is associated with every 15-20 sqm of net floorspace (Appendix 7.1). Based on the midpoint value of this range (17.5 net sqm), together with an estimate of the number of people in the area likely to be employed in the

above-mentioned sectors, it is possible to estimate floorspace capacity. This approach is also based on a number of key assumptions from the 2016 census which are explained below.

- According to the 2016 census the labour force participation rate in the LAP area, as defined by its three largest electoral divisions, is 70%. The labour force comprises persons aged 15 and over who are employed, looking for a first job, or unemployed. This rate of 70% is actually higher than that proportion for the state (61%) and for Dublin City Council (65%). Application of this rate to the projected population aged 15 and above in the LAP area by 2027 (19,888 persons) gives a labour force of 13,922.
- Based on the 2016 census a total of 53.4% of this labour force in the LAP (7,434 workers) is likely to be employed in sectors related to the floorspace considered, namely 27.2% in commerce and trade, 21.3% in professional services and 4.9% in public administration.
- Approximately a fifth of the above LAP employees will work in the area. This is based on the census finding that roughly a fifth of workers (20%) take 15 minutes or less to get to work. This assumption is also premised on the understanding that most of these jobs created in this area will be taken up by the local population.

The interplay of these assumptions is tabulated below to arrive at a floorspace estimate of 26,020 net sqm or 37,171 gross sqm (Table 7.3).

Table 7.3

Floorspace capacity 2027 based on Employment Density Levels (LAP population only)	
Population of LAP 2027	26,518
Population aged 15 and above	19,888
Labour force in LAP based on labour force participation rate of 70%	13,922
Potential employees in related sectors in LAP (53.4% of above)	7,434
Proportion employed in LAP (20% of above)	1,487
Net sqm required based on 17.5 sqm per employee	26,020
Gross sqm required based on 70:30 net to gross	37,171

Clearly this floorspace figure of 37,171 gross sqm is a very rough estimate and open to considerable refinement depending on changes to assumptions used. However, the figure does resonate with the upper limit size of major District Centres observed in Belfast, i.e. 33,000 gross sqm.

When this calculation is rerun on the basis of a higher population figure that includes both the population of the LAP and adjoining Fingal lands (33,775 persons in total) the floorspace estimate increases to 47,344 gross sqm (Table 7.4).

Table 7.4

Floorspace capacity 2027 based on Employment Density Levels (LAP + adjacent Fingal pop)	
Population of LAP and adjacent Fingal lands 2027	33,775
Population aged 15 and above	25,331
Labour force in LAP based on labour force participation rate of 70%	17,732
Potential employees in related sectors in LAP (53.4% of above)	9,469
Proportion employed in LAP (20% of above)	1,894
Net sqm required based on 17.5 sqm per employee	33,141
Gross sqm required based on 70:30 net to gross	47,344

Projected mix of economic uses

Using the above floorspace figures estimated on the basis of employment density levels it is possible to estimate the breakdown of this floorspace in the LAP according to the average percentage mix of uses found in cities in the UK and Ireland. This information is available from GOAD Experian. While the GOAD Experian information includes District Centres it relates mainly to town centres and is disproportionately represented by the high level of comparison goods floorspace located there. Therefore, by focusing purely on the average percentage mix of service uses surveyed by GOAD Experian, it is possible to estimate the breakdown of other economic (service) uses in the LAP by building upon the retail floorspace estimates made for Clongriffin-Belmayne in Section 6.0.

Mindful of the above, Table 7.5 outlines the mix of uses for the LAP area. A number of points are worth noting in respect of these findings.

- Leisure service uses are expected to account for nearly half of the floorspace (47.1%).
- Convenience and comparison floorspace combined is next highest (jointly at 33.6%) followed by financial and professional services (12.6%) and retail service (6.6%).

Table 7.5

Projected Mix of floorspace capacity 2027 (LAP population only)		
Category of use	Floorspace (sqm)	%
Convenience goods retailing	4,160	16.0%
Comparison goods retailing	4,582	17.6%
Retail service use	1,728	6.6%
Leisure service use	12,267	47.1%
Financial & professional service	3,283	12.6%
Total net sqm	26,020	100.0%
Total gross sqm based on 70:30 net to gross	37,171	

Again, the projected mix of uses can be estimated on the basis of both the population within the LAP and in adjoining Fingal lands (Table 7.6).

Table 7.6

Projected Mix of floorspace capacity uses 2027 (LAP + adjacent Fingal population)		
Category of use	Floorspace (sqm)	%
Convenience goods retailing	4,582	13.8%
Comparison goods retailing	5,835	17.6%
Retail service use	2,272	6.9%
Leisure service use	16,134	48.7%
Financial & Professional service	4,318	13.0%
Total net sqm	33,141	100.0%
Total gross sqm based on 70:30 net to gross	47,344	

7.3 Requirement for additional retail & economic (service) use floorspace

This part of the Study balances the projected floorspace capacity for retail and service uses against the existing floorspace in the LAP (including vacant and permitted) in order to assess the additional floorspace requirement. As explained previously, floorspace at the Clarehall Shopping Centre site, which includes adjacent retail units, is discounted from these calculations because it exerts a subregional appeal that extends beyond this local area. Its footprint would have an unreasonable and disproportionate impact on the estimation of floorspace requirements in the LAP.

Based on the population in the LAP alone Table 7.7 estimates that, when account is taken of the level of vacancy (10,900 net sqm) in the area, together with extant permissions (1,673 net sqm), the requirement for additional retail and economic floorspace amounts to 8,529 net sqm. The permitted net floorspace is detailed in Appendix 7.2.

Table 7.7

Additional Retail & Economic floorspace requirement 2027 (LAP Population only)			
	A	B	C=A-B
	Projected Net sqm	Existing occupied Net sqm	Capacity Net sqm
Convenience goods retailing	4,160	796	3,364
Comparison goods retailing	4,582	1,900	2,682
Retail Service	1,728	423	1,305
Leisure Service	12,267	1,051	11,216
Financial and professional service	3,283	748	2,535
Total	26,020	4,918	21,102
		<i>Less Vacant net sqm</i>	10,900
		<i>Less Permitted net sqm</i>	1,673
		Additional net sqm required	8,529

When the above table is reworked on the basis of both the LAP population and adjacent population in Fingal the remaining capacity increases considerably to 15,650 net sqm (Table 7.8).

Table 7.8

Additional Retail & Economic floorspace requirement 2027 (LAP + adjacent Fingal population)			
	A	B	C=A-B
	Projected Net sqm	Existing occupied Net sqm	Capacity Net sqm
Convenience goods retailing	4,582	796	3,785
Comparison goods retailing	5,835	1,900	3,936
Retail Service	2,272	423	1,850
Leisure Service	16,134	1,051	15,083
Financial and professional service	4,318	748	3,570
Total	33,141	4,918	28,223
		<i>Less Vacant net sqm</i>	10,900
		<i>Less Permitted net sqm</i>	1,673
		Additional net sqm required	15,650

7.4 Conclusion

The above assessment estimates that, once allowance is made for existing, vacant and permitted floorspace in Clongriffin-Belmayne, in the region of 8,529 and 15,650 net sqm of additional retail and economic floorspace could be built in the LAP by the year 2027. This forecast is based on a number of assumptions not least of which is the prediction of a significant increase in residential development and the continuance of a buoyant economy. The breakdown of this additional floorspace is considered in greater detail in Section 8.0.



Strategic Guidance

08

8.0 Strategic guidance

8.0 Introduction

Taking on board the foregoing research and analysis, the final section of the Study provides the following strategic advice:

- Recommendations on the scale, nature and location of retailing in Clongriffin/Belmayne for both the convenience goods and comparison goods retail sectors;
- Recommendations on the scale, nature, location and phasing of related employment uses in Clongriffin/Belmayne; and
- Strategic guidance for Masterplan development of lands at Belmayne KDC.

The purpose of this strategic guidance is not to rigidly prescribe the quantum and type of retail economic floorspace for the area. Rather, its primary aim is to outline the broad scale and mix of uses that could be developed on Key District Centre lands mainly owned by Dublin City Council at Belmayne. With this in mind, it has to be reiterated that the distribution of projected floorspace uses in this Study are indicative only and are principally intended to inform the development of Masterplan lands at Belmayne. They are not meant to act as floorspace caps on economic and retail development in the LAP.

8.1 Recommendations on Retailing

On the face of it, the quantitative findings of this Study would suggest that, if the Clarehall Shopping Centre site (22,167 gross sqm), which includes the adjacent retail units, is considered to cater for the exclusive needs of the LAP then there is limited scope to add further retail and economic uses to those already built. Beyond the Clarehall Shopping Centre site the existing retail and economic floorspace totals 22,937 gross sqm, 7,366 gross sqm of which is occupied and 15,571 gross sqm is vacant.

However, as revealed in the household survey, **Clarehall exerts a subregional appeal** that extends beyond this local area. Its attraction relates principally to the size of the Tesco Extra store. Full occupancy of the units in the Centre and adjacent units on the former Fitness First site bears testament to its appeal. It would be unreasonable therefore to maintain that the quantum of floorspace at Clarehall should serve as a cap or inhibit development north of Grange Road. This is especially so given that the household survey findings indicated a desire for additional retail and service facilities in the Belmayne and Clongriffin area.

The need for a broader evaluation of need in the Clongriffin-Belmayne area is also supported by the potential for significant residential development on neighbouring Fingal lands. Even though the assessment in this Study took into account the existing and projected population on adjacent Fingal lands there are other significant parcels of zoned housing land in Fingal which, in due course, could arguably form part of the retail and service catchment for Belmayne and Clongriffin KDC.

Mindful of the above, strategic guidance on retailing is provided separately for both the convenience goods and comparison goods sectors.

(i) Convenience goods

Scale & nature

Based on the analysis in Section 6.0 Table 8.1 indicates that Clongriffin-Belmayne has the capacity to accommodate in the region of 4,160 and 4,582 net sqm of new convenience goods floorspace by the time it is fully developed and occupied for residential use in the year 2027.

Table 8.1

Capacity for Convenience goods retail development 2027	
	Net sqm
Low forecast	4,160
High forecast	4,582

Reference to Table 8.2 indicates that 796 net sqm of this floorspace capacity is already built. Moreover, when the vacant and permitted supermarkets at Clongriffin (1,326 net sqm and 1,170 net sqm respectively) are also subtracted from the low capacity figure, there is still scope for additional floorspace (i.e. 4,160 net sqm less 3,292 net sqm=868 net sqm). Clearly, the scope for additional convenience goods floorspace increases if the adjacent Fingal population is taken into account under the higher capacity forecast (i.e. 4,582 net sqm less 3,292 net sqm=1,290 net sqm). **Overall, the findings would suggest that there is capacity to permit another supermarket in the LAP area in addition to the vacant and permitted supermarkets at Clongriffin.**

Table 8.2

Existing, vacant and permitted Convenience Goods floorspace	
	Net sqm
Existing	
Eurospar (Northern Cross)	490
Centra (Main St)	106
Central Shop (Belmayne Ave)	58
Fine wines (Northern Cross)	34
Off-licence (Main St)	109
Existing subtotal	796
Vacant	
Vacant supermarket (Block 12, Clongriffin)	1,326
Permitted	
Permitted supermarket (Block 28, Clongriffin)	1,170
Total	3,292

Note: Clarendon Shopping Centre site is omitted due to its subregional appeal beyond the LAP area.

Expanding grocery provision in Clongriffin-Belmayne can be considered beneficial in two interrelated respects. Firstly, it will help retain a greater proportion of convenience goods expenditure within the area and thereby stem leakage to competing centres. Secondly, bearing in mind the potential for shared shopping trips, the increased attraction of the area for regular food shopping can only augur well for the trade of other businesses.

Location

Having regard to the existing pattern of development, major convenience goods development should be first directed to land designated as Key District Centre (KDC). Cognisant of the two commercial nodes that comprise the Clongriffin-Belmayne KDC it is recommended that the supermarket be integrated as part of Masterplan development in the northeast quadrant of Belmayne KDC. Development here would heighten the potential for synergy with existing and proposed businesses.

The appropriateness of developing a supermarket beyond KDC lands should be assessed on the basis of sequential test criteria in the Retail Planning Guidelines 2012.

Phasing

In theory, the facilitation of another supermarket development should ideally take place once the vacant supermarket at Clongriffin is occupied. However, its earlier development should be countenanced in circumstances where it is considered critical to the delivery of a wider development scheme, notably the creation of a new town square at Belmayne.

(ii) Comparison goods

Scale and nature

It is anticipated that Clongriffin/Belmayne KDC has the capacity to accommodate at least 4,582 net sqm of comparison goods floorspace by the year 2027 (Table 8.3). A more optimistic projection which includes population growth in adjacent Fingal lands sees this capacity rise to 5,835 net sq m.

Table 8.3

Capacity for Comparison goods retail development 2027	
	Net sqm
Low forecast	4,582
High forecast	5,835

When account is taken of the existing Meadows & Byrne unit and two pharmacies, as well as vacant and permitted units at Northern Cross, Main Street/Belmayne Avenue and Clongriffin Main Street (Table 8.4) there is scope to add between 722 and 1,975 net sqm of comparison goods floorspace. These are calculated by subtracting the 3,860 net sqm figure in Table 8.4 from the 4,582 net sqm and 5,835 net sqm capacity figures in Table 8.3.

Table 8.4

Existing, vacant and permitted Comparison Goods floorspace	
	Net sqm
Existing	
Existing Meadows and Byrne (Northern Cross)	1,500
Pharmacies	400
Existing subtotal	1,900
Vacant	
Vacant units at Northern Cross	419
Vacant units at Belmayne	475
Vacant units at Clongriffin & Main Street	946
Vacant subtotal	1,840
Permitted	
2 Permitted units (Block 17, Clongriffin)	120
Total	3,860

A note of caution in the treatment of this analysis for comparison goods shopping is necessary for a number of reasons. These are outlined below.

- A fair proportion of the vacant units capable of operating as comparison goods outlets are on side streets that would not be considered prime pitch and may therefore lack appeal for purveyors of comparison goods.
- Recent trends have indicated that retail units for comparison goods are increasingly subject to change of use applications to other uses, particularly retail service and leisure service use.

Planning permissions for change of use from retail to office/community use at Clongriffin (Refs 4054/16 and 2955/17) testify to this state of affairs.

In light of the above considerations it would be inappropriate to attach substantive technical weight to extant planning permissions that allow for comparison goods retailing in these units.

While the assessment of future convenience goods floorspace demonstrates a capacity for another supermarket, and indeed the household survey also recorded the potential for a bakery and butchers, it is less clear what specific uses can be prescribed for comparison goods shopping. Experience in other district centres demonstrates that comparison goods units which sell essential durable goods and low cost items are the most resilient to competition. Experience also indicates that the provision of an anchor supermarket significantly helps to attract other comparison and service units into an area. Ultimately, it will be the market that will decide the type of comparison goods retailers that will be attracted to Clongriffin-Belmayne KDC. To this end, the Retail Study has provided guidance in quantifying how much comparison goods retail space could be provided on mainly Council owned lands at Belmayne/Belcamp Lane in addition to the existing, vacant and permitted floorspace in the LAP.

Location

It is no coincidence that the largest comparison goods retailer in Clongriffin/Belmayne (Meadows & Byrne) has chosen to locate at a prominent corner unit at Northern Cross. High visibility and high accessibility are fundamental to the success of comparison goods retailing, with customers prepared to undertake longer journeys to compare the price and quality of items. Opportunities may emerge with the creation of a new town square and the connection of Main Street with Belmayne/Northern Cross, the multiplier effect of which may offer hope for occupancy of vacant units further along Main Street.

Emphasis should first be placed on securing occupation of the most prominent vacant units that front the Malahide Road, Main Street and Station Square, as opposed to those vacant units located to the side and rear of blocks. Furthermore, in order to promote their occupancy, maximum flexibility should be applied to the land uses permissible in units to the side and rear of blocks at Belmayne/Northern Cross and Clongriffin.

The Z4 zoning of Key District Centre (KDC) lands allows a wide range of uses to be developed at this location. The Council has added to this land use flexibility by ensuring that no office size cap applies to KDCs. The expansive lists of uses that are “permissible” and “open to consideration” in the KDC are outlined in the Dublin City Development Plan 2016-2022. Developers have also embraced the need for flexibility in pursuing land use options. For example, permission has been obtained (Ref 3776/15) to build convertible duplex/retail units on groundfloor units on Main Street, Clongriffin. This allows for the conversion of duplex residential units to retail use at a later date if demand exists.

8.2 Recommendations on Economic uses

Scale and nature

This Study estimates that, once allowance is made for vacant floorspace and permitted floorspace that is still extant, in the region of 8,529 and 15,650 net sqm of additional retail and economic floorspace could be built in the LAP by the year 2027 (Table 8.5).

Nature – mix of uses

Mindful of the typical floorspace profiles of town centres, district centres and shopping centres (many of which now function as district centres) the mix of the additional floorspace for economic uses can be estimated (Table 8.5).

Table 8.5

Additional Retail and economic floorspace requirement 2027		
	Low forecast	High forecast
	Net sqm	Net sqm
Convenience goods retailing	868	1,290
Comparison goods retailing	722	1,976
Retail Service	601	1,117
Leisure Service	5,169	9,111
Financial and professional office	1,168	2,156
Total	8,529	15,650
Total gross sqm estimated on basis of 70:30 net to gross split	12,184	22,358

Note: these figures are in addition to vacant and permitted (extant) floorspace

The mix of uses in Table 8.5 is guided by the expectation that, as in the UK, the restaurant/café trade will perform an increasing role in the trade of shopping/commercial areas. Indeed, leisure service uses of this type are anticipated to account for the largest amount of floorspace. Specific economic uses that may be attracted to the area could include a café, family friendly restaurant and public house. Permission for the latter is in place at Clongriffin.

Location

Mindful of the key objective of the emerging Masterplan to open up the LAP area by directly linking onto the Malahide Road at a point almost opposite Mayne River Avenue it is appropriate to concentrate the bulk of new economic uses in the NE quadrant of the Belmayne KDC. The obvious commercial visibility advantage that this location enjoys, as well as its corresponding market appeal in this regard, underscores this recommendation.

The proposed distribution of the floorspace capacity range for retailing and economic uses is graphically depicted in Figures 8.1, 8.2 and 8.3. Understandably, nearly all of the floorspace (97%) is allocated to the two urban nodes that comprise the zoned Key District Centre (KDC) land at Belmayne and Clongriffin. In this regard, over half the projected floorspace (56%) is targeted for the northeast quadrant of the Belmayne KDC. This area is referred to as the Belmayne Town Centre site in the LAP and is earmarked for the development of a new Town Square. The balance of floorspace is apportioned to Clongriffin KDC (26%), the southwest quadrant of Belmayne KDC (15%) and the junctions of Main Street with Belmayne Avenue and the Hole in the Wall Road (3%).

The junction of Main Street with Belmayne Avenue is identified as a community hub in the LAP but it is considered appropriate to cater for a small-scale expansion of existing facilities. The junction of Main Street with the Hole in the Wall Road is somewhat limited to opportunities at Priory Hall, given the presence of Father Collins Park and the Trinity Sports and Leisure Centre.

The proposed distribution has regard to a combination of factors, including: the existing pattern of development; occupancy rates and preliminary Masterplan proposals.

As stated previously in this Study the proposed distribution of uses should not be viewed as a rigid prescription of floorspace requirements across the LAP. Rather it should be viewed as broad guidance for the development of mainly Council owned lands at Belmayne and Belcamp Lane.

Figure 8.1

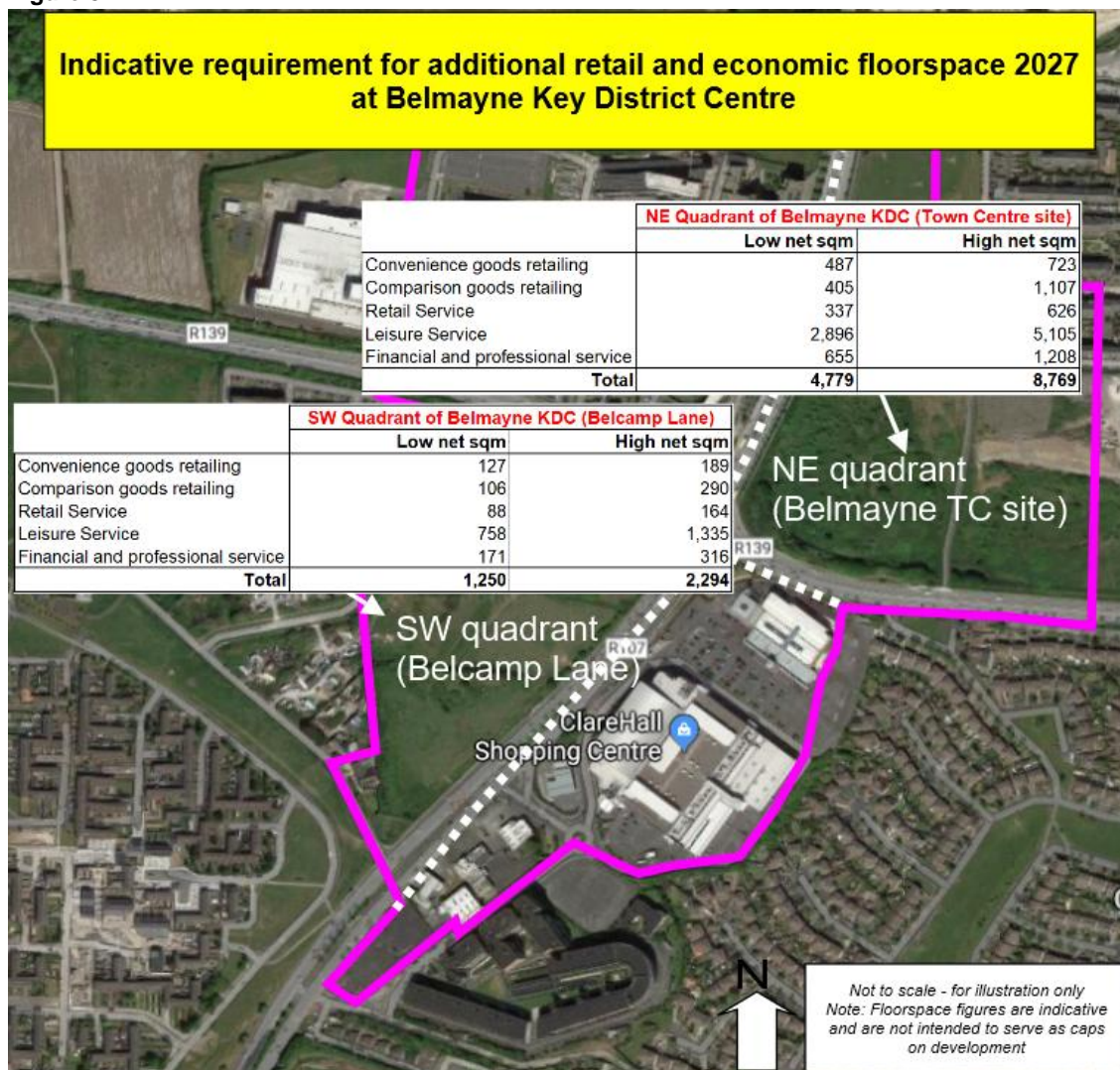


Figure 8.2

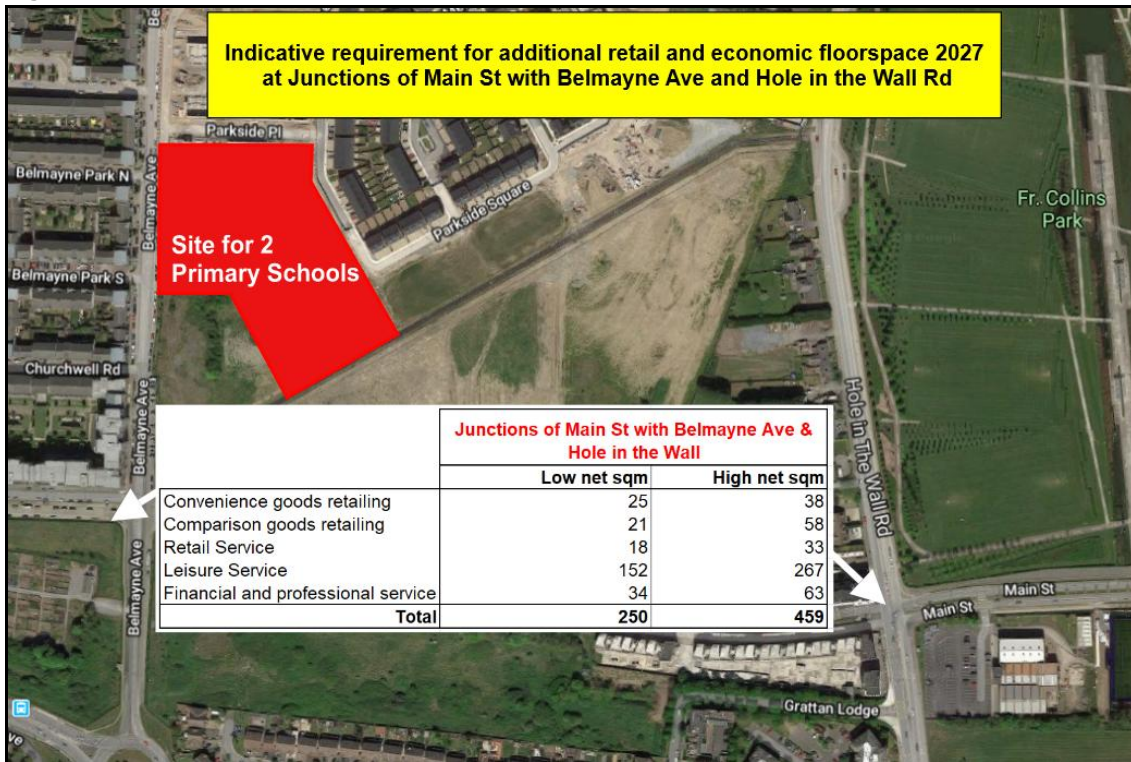
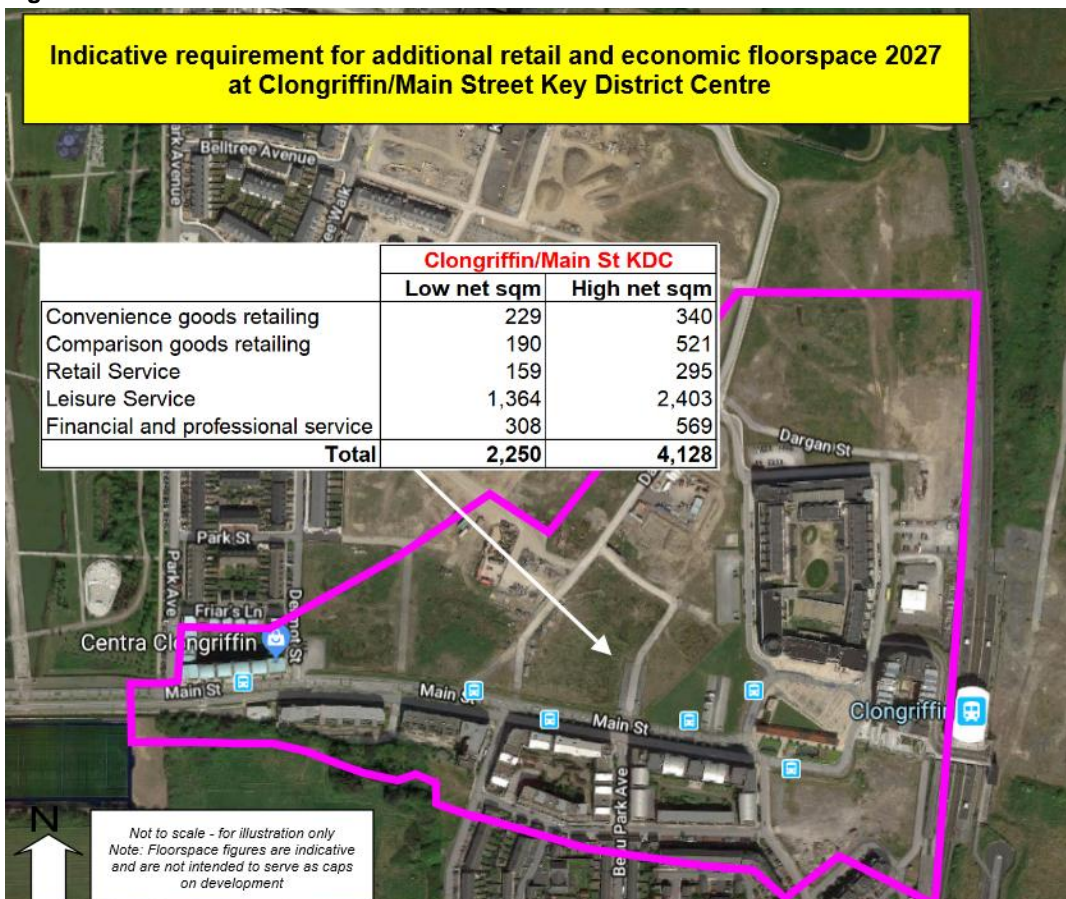


Figure 8.3



Phasing

The phasing of economic development in the area is contingent upon a number of interrelated considerations, including:

- The necessity to address the abnormal level of vacancy that exists;
- The likelihood and timing of significant planning permissions for residential development being implemented;
- The need to showcase the LAP area as a new exciting part of Dublin's urban fabric.

On balance, it would seem inappropriate to prohibit further development taking shape at Belmayne KDC until the bulk of vacant units are first occupied. This approach is justified on the basis that an improvement in the business environment in one part of the LAP can only bode well for the fortunes of vacant units on other parts. This view is also vindicated by the household survey finding which highlighted a requirement for additional shops and related services in the area.

8.3 Masterplan recommendations

Central to planning for District Centres is the physical enhancement, management and promotion of the area as a place to live, visit and do business. The cornerstone of functional and public realm enhancement in this Key District Centre should relate to the creation of a town square focal point at Belmayne. Its development can help reinforce the Key District Centre's distinctiveness and sense of place, and thereby bolster its commercial offer. While the LAP area benefits from close proximity to both the M50 and Dublin airport it is less clear to the visitor where the heart of this LAP lies. This underlines the necessity to establish a prominent focal point at the Belmayne node of the KDC as a complement to the Clongriffin Station Square focal point. Integral to the development of the new Town Square will be the provision of high quality streetscape, hard and soft landscaping, public art, ornate lighting, etc.

At present, the sense of place at the Belmayne/Northern Cross intersection is subservient to its transport function as a main junction in this part of Dublin. Both the Malahide Road and M50/M1 Link/Grange Road (R139) are divisive in that they inhibit interaction between the bulk of the LAP area and surrounding neighbourhoods. A proposal to realign the R107 Malahide Road by creating a bypass west of existing development at Northern Cross, as indicatively shown in the LAP's Transport Strategy Map, would help to significantly improve this state of affairs by facilitating ease of pedestrian movement from one side of the road to the other.

There are a number of specific recommendations that can be made in respect of the Masterplan being prepared by the Council. These are outlined as follows:

- Ensure that the new civic space at Belmayne KDC creates a vista for Main Street with uninterrupted forward sightlines that alert and encourage people to visit the interior of this LAP.
- Develop a new supermarket in the NE quadrant of the Belmayne KDC as a counterbalance to the permitted supermarket space at Clongriffin and as catalyst for wider development at the new town square.
- In contrast to the vacant units evident at the rear and side of commercial blocks, new economic and retail development should be designed so as to maximize its visibility, with its frontage directly or partially facing the main road or street. In this regard, emphasis should be placed on planning for the accommodation of retail and economic uses on primary commercial frontages as opposed to secondary commercial frontages.

- Provide for sufficient flexibility in the size of units proposed as part of the new urban grain, including by future amalgamation or subdivision of units, in order to generate investment interest from developers and end-users alike.
- Seek to attract uses that also promote evening activity around the proposed new square.
- Consider the feasibility of permitting convertible residential/retail units in less prominent frontage locations beyond the new Town Square and outside of key corner plots facing the Malahide Road, Main Street and Grange Road.
- Incorporate an element of bay-parking on the eastern side of Malahide Road (R107), at the NE Quadrant, to capitalise upon the volume of passing trade.

8.4 Conclusion

The principal aim of this Study is to quantify the broad scale and mix of economic and retail uses that could be developed on mainly Council-owned lands at Belmayne and Belcamp Lane in the foreseeable future.

Despite the high level of vacant units in evidence, as well as extant permission for more, there is scope to develop further economic and retail space in the LAP area. This is due principally to the significant population growth envisaged for this location. It is considered that an appreciable amount of this additional economic and retail space could be developed in conjunction with the town square initiative for the Belmayne Key District Centre.

While it is recognised that economic conditions and market interest will ultimately determine how much economic and retail floorspace will be built in this area in the coming years this Study is intended to assist the Council in planning for such development. Finally, it must be emphasized that the floorspace findings in this Study are advisory in nature and are not intended to serve as prescriptive floorspace caps on future economic and retail development in the LAP.

Appendices

Appendix 4.1: Household Survey Questionnaire

Appendix 4.2: Results of Household Survey

Appendix 6.1: Categories of Expenditure in Household Budget Survey 2016

Appendix 6.2: Expenditure growth forecasts, Experian 2017

Appendix 6.3: Turnover estimates, Experian 2017

Appendix 6.4: Online retailing forecasts, Experian 2017

Appendix 7.1: Employment Density Levels in UK, 2015

Appendix 7.2: Permitted commercial/retail space in Clongriffin/Belmayne

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