Ballymun Retail Study 2016
Final Report

Prepared on behalf of Dublin City Council

Quality information

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Acknowledgements

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Executive Summary

Introduction

The Ballymun Retail Study has been prepared in order to inform the new statutory Local Area Plan (LAP) for Ballymun. The study provides guidance on the capacity for new retail development in the Key District Centre of Ballymun, as well as advice on the nature and location of this development in the foreseeable future up to the year 2022.

Types of retailing

For the purposes of the retail study shops are categorised as outlets selling either convenience goods or comparison goods. Convenience goods are mainly groceries and other consumable commodities that are purchased regularly and usually locally. They include food, drinks, tobacco, and non-durable household goods. 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.

Household shopper survey

An integral component of this retail study was the carrying out of a household shopper survey of Ballymun and surrounding area. It was targeted at acquiring facts on shopper behaviour and obtaining views from the local shopping public. It was commissioned by the Council in order to obtain an independent, evidence-based understanding of shopping patterns in the area so that it can better plan for retailing in Ballymun.

Expenditure leakage & a desire for more shopping

Significantly, the survey revealed low levels of disposable income and high rates of expenditure leakage from Ballymun for both convenience goods and comparison goods shopping. It also revealed a corresponding desire by the residents to improve shopping provision in the District Centre.

Retail floorspace projections

Equipped with these survey findings, the Retail Study was able to estimate the capacity for additional retail floorspace based on locally indexed figures and assumptions. These constitute the low floorspace projections tabulated below i.e. 1,258 net sq.m. for convenience goods and 1,551 net sq.m. for comparison goods. The low floorspace capacity for convenience goods development is equivalent in size to a new supermarket. The low floorspace capacity for comparison goods shopping approximates in size to a dozen Main Street units or two of the retail warehouses in Gulliver’s Retail Park.

In the interest of sensitivity testing and in order to allow for flexibility in floorspace requirements should economic and population conditions improve, the capacity for additional retail floorspace was also estimated on the basis of higher regional figures for Dublin, which are similar to national figures. These constitute the high floorspace projections tabulated i.e. 2,115 net sq.m. for convenience goods and 3,340 net sq.m. for comparison goods. These high floorspace projections for Ballymun also take into account the prospect of additional retail expenditure from workers and students in the area and the possibility of a significant increase in population from new housing development.

Capacity for additional retail floorspace in Ballymun up to 2022

Floorspace category	Forecast	Net sq.m.	Net sq.ft.
Convenience goods	Low	1,258	13,541
	High	2,115	22,766
Comparison goods	Low	1,551	16,694
	High	3,340	35,951

Notwithstanding the tabulated findings above it is important to note that the high capacity projections are not intended to function as floorspace caps. Rather, as recognized in the national 2012 Retail Planning Guidelines (section 3.6) the floorspace estimates are intended to provide broad guidance on retail floorspace need and should not serve to inhibit competition.

Key recommendations of study

Based on the interrelated output of the household shopper survey, the consultation process, floorspace need projections, and comparative analysis with other District Centres, a number of recommendations were formulated. These relate to retailing, associated public realm enhancements and District Centre management (see tables in Section 7 of the Retail Study for full lists of recommendations). The main recommendations include the following:

- Encourage opening of another foodstore in Ballymun's zoned Z4 "mixed services" lands to help claw back expenditure leakage. Capacity exists to add between 1,258 and 2,115 net sq.m. of new convenience goods floorspace in Ballymun up to the year 2022.

- Facilitate opening of a number of comparison goods units, including bulky goods units, in association with this foodstore development. Capacity exists to add between 1,551 and 3,340 net sq.m. of new comparison goods floorspace in Ballymun up to the year 2022.

- Adopt the sequential approach to the assessment of large retail proposals by appraising the suitability, availability and viability of first developing land for retail use within and around the largest commercial node in Ballymun (depicted as No.1 in the map overleaf). Development south of Santry Avenue, including the Metro Hotel, constitutes the second commercial node in Ballymun (shown as No.2).

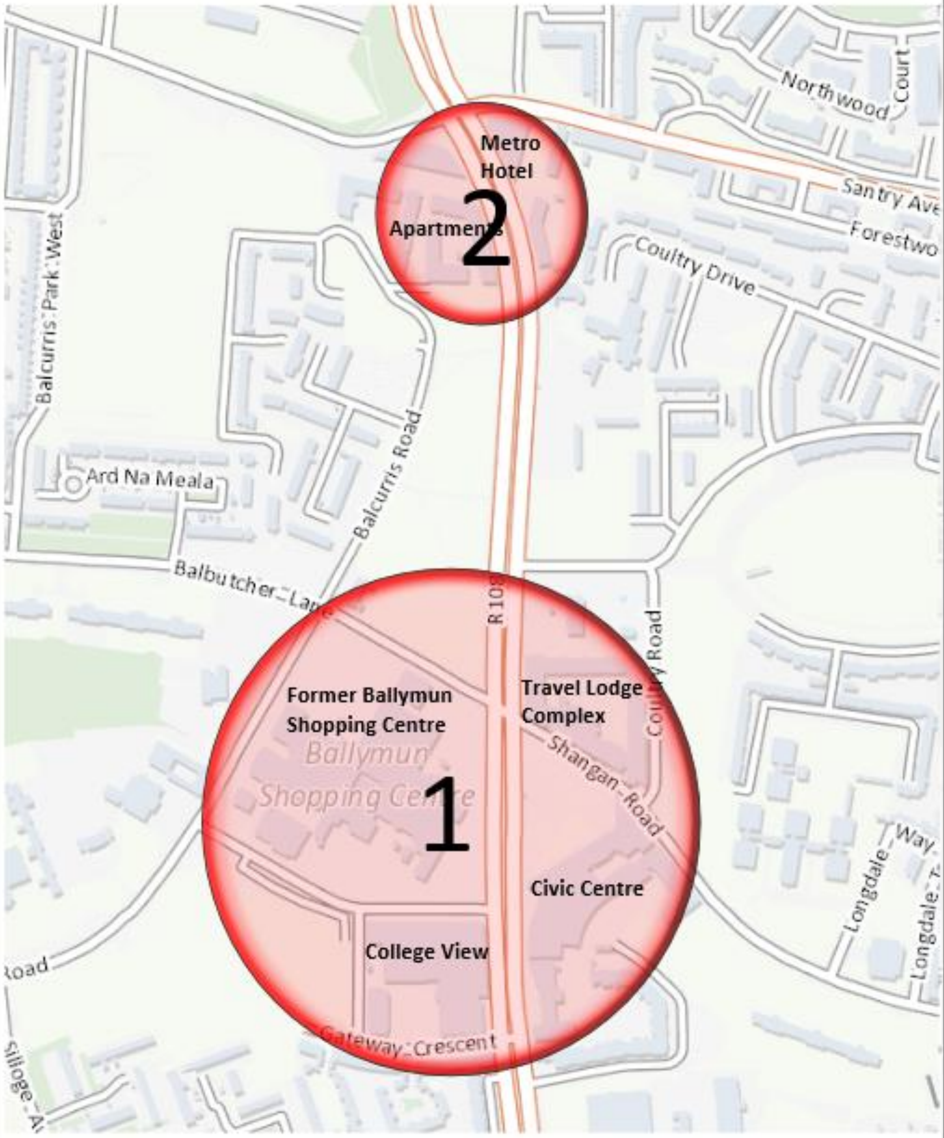
- Develop new retail units in a non-mall format with own-door shopfronts that are free from the operational, leasing and servicing commitments of a shopping centre.

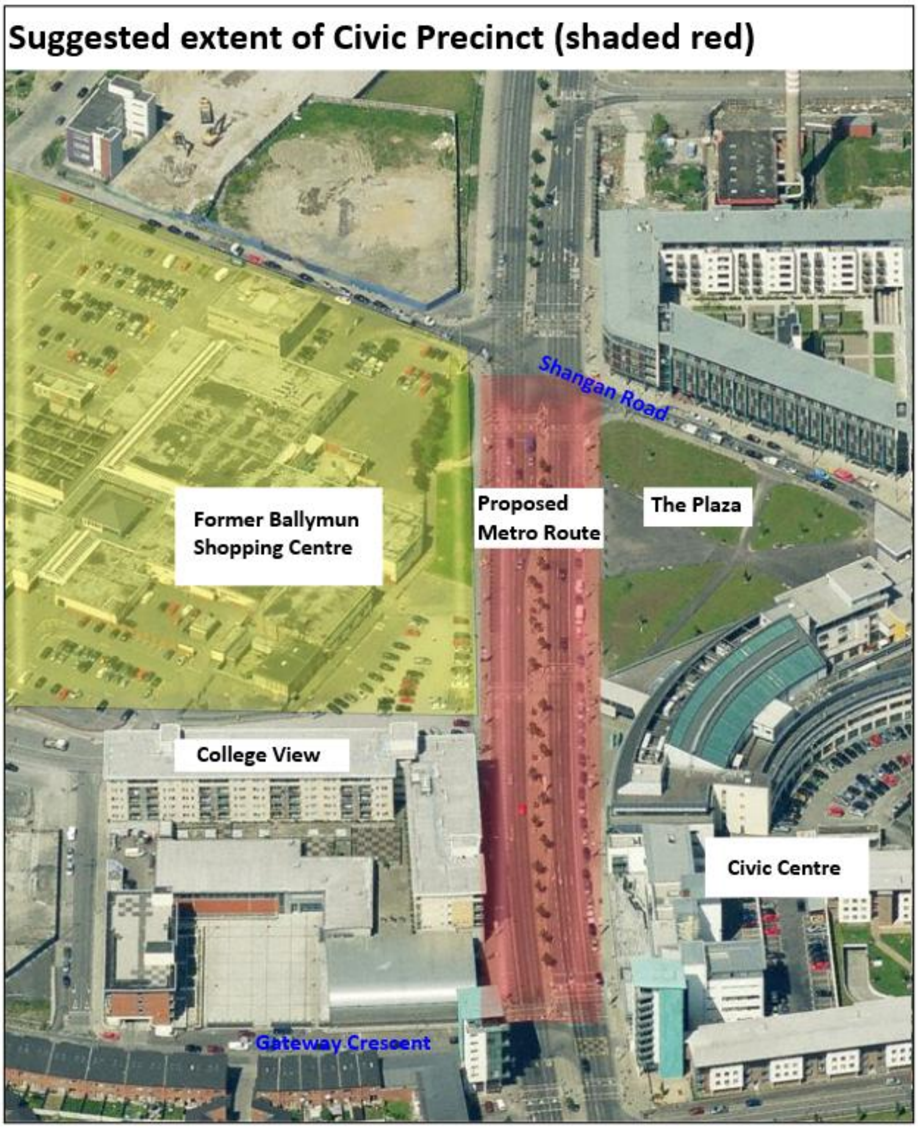
- Designate the area (circa 270m long) on Main Street between Shangan Road & Gateway Crescent as a Civic Precinct, which would act as a focal point for Ballymun (see aerial image on page 11). Create a distinctive sense of place and identity at the Civic Precinct via streetscape enhancements and ensure that the precinct integrates with proposals for the Metro Stop and aspirations to increase the functionality of the Plaza area.

- As a complement to the above proposal promote the creation of a quality built environment on the site of the former shopping centre, capable of instilling a sense of arrival and encouraging people to stop and shop.

Despite its current condition the Ballymun Shopping Centre site is pivotal to the continued regeneration of Ballymun. While it is recognised that market realities and business viability models will ultimately determine how much retail floorspace will be built in Ballymun in the coming years this Retail Study is intended to assist the Council in planning for such development.

Commercial Nodes in Ballymun




Suggested extent of Civic Precinct (shaded red)
Shangan Road
Former Ballymun
Shopping Centre
Proposed
Metro Route
The Plaza
College View
Civic Centre
Gateway Crescent

PART A: Introduction

01

Introduction

1.0 Preface

This Retail Study for the Ballymun area has been prepared by AECOM Ltd at the request of Dublin City Council (DCC). It was commissioned by the Council in order to obtain an independent, evidence-based understanding of shopping patterns in the area so that it can better plan for retailing in Ballymun.

The specific purpose of the study is to inform the retail strategy of the new statutory Local Area Plan for Ballymun. In this regard, it is intended to assist in the formulation of retail guidance relating to the scale, nature and location of future retail provision during the plan period.

1.1 Scope of Study - Terms of reference

The Brief required the completion of a retail assessment and strategy for Ballymun over a four month period from September 2015 to December 2015. Meetings with the Council underlined the importance of acquiring raw data on consumer behaviour and the existing shopping environment. The specific items listed in the Council's terms of reference are outlined below:

- Retail Survey of Ballymun and north Glasnevin residents
- Survey of surrounding retail centres
- Analysis of retail seepage based on the above
- Identify barriers to retail development
- Market analysis of the appropriate retail quantum provision for Ballymun
- Identify phasing strategies
- Identify suitable complementary uses
- Advise on the types of retailing for Ballymun.

A key element of the study was to provide a realistic assessment of retailing in the context of the area's designation as a key district centre within the Dublin City Development Plan 2011-2017 and the Retail Strategy of the Greater Dublin Area 2008-2016.

As the work progressed it became increasingly apparent that the stipulated "retail survey of Ballymun residents" would form the backbone of the Retail Study. Its findings are relevant, both directly and indirectly, to the consideration of all the other terms of reference cited above.

1.2 National guidance on Retail Strategies

The commissioning of this Retail Study is consistent with the emphasis in the 2012 national Retail Planning Guidelines (RPGs) for "evidence-based" retail planning. Section 3.3 of the RPGs 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 study. The minimum requirements include information on the following:

- *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*;
- *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.*

As this strategy applies to a District Centre it was not considered necessary to define a core shopping area, as referred to in the third requirement listed above. However, there are two distinctive nodes of commercial activity in Ballymun and these are highlighted in the study.

Also, while the RPGs state that the broad assessment for additional retail floorspace only applies to those areas covered by a joint or multi-authority retail strategy, such as the Greater Dublin Area (GDA), a localised assessment of the requirement for additional retail floorspace in Ballymun is considered an integral part of this study.

1.3 Structure of report

Within the context of the above points, the retail study essentially consists of 3 parts, which are briefly described below.

- Part A contains 3 sections that outline the retail context for the study. It provides an overview of the existing retail environment and the trading position of Ballymun within the retail hierarchy.
- Part B details the key strands of research and analysis undertaken to inform the retail study. These include a shopper household survey, retail floorspace projections and comparative analysis with other District Centres.
- Part C considers the prospects for retailing in Ballymun in the light of the above baseline analysis and outlines strategic recommendations to assist with forward planning in the area.

Planning Background

02

Planning Background

2.0 Introduction

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

- National Retail Planning Guidelines 2012
- Ballymun Local Area Plan – Issues Paper 2015
- Draft Dublin City Development Plan 2016-2022
- Dublin City Development Plan 2011-2017
- Fingal County Development Plan 2011-2017
- Retail Strategy for the Greater Dublin Area 2008 – 2016
- Regional Planning Guidelines for the Greater Dublin Area 2010-2022
- Greater Dublin Area Draft Transport Strategy 2011-2030
- Fingal/North Dublin Transport Study, November 2014
- Ballymun Masterplan 1998 and updated project map 2007
- Ballymun Economic Plan 2015 (Draft)
- Planning history on existing and proposed retail sites

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

2.1 Retail Planning Guidelines 2012

The requirement to undertake the study stems from the requirements of the Retail Planning Guidelines 2012 (RPGs). Section 2.2.4 of the RPGs relates to District Centres, which states:

*"Having designated the relevant city and town centre areas and any district centres in the core strategy, **it is the function of the retail strategy of the relevant development plan to specify the level and types of retailing that will be appropriate to those areas**."*

Section 3.4 of the RPGs 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, RPGs)

Moreover, the RPGs specify 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, RPGs)

It will become evident throughout this Study that there is a demonstrable level of under-provision of retail space in Ballymun and that, accordingly, there is capacity to add to its retail provision.

2.2 Ballymun Local Area Plan – Issues Paper 2015

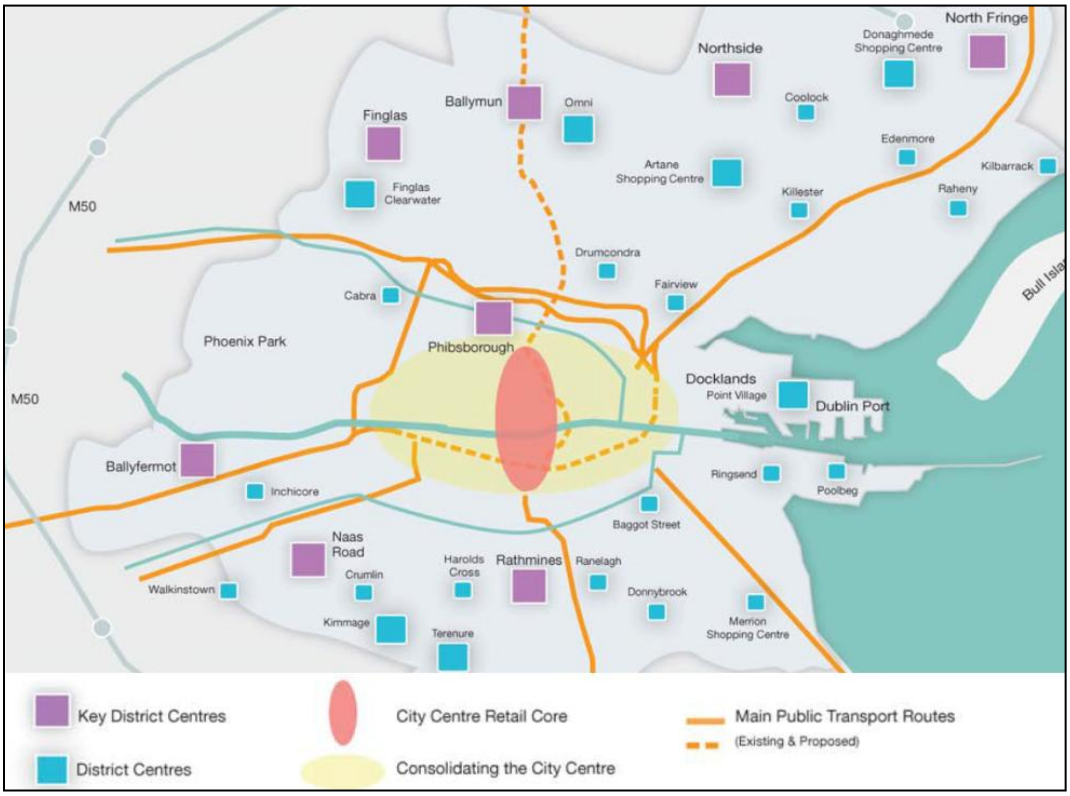
The Issues Paper for the Ballymun Local Area Plan was published for public consultation from the 5th November until the 3rd December 2015. Ten of the twenty-nine written submissions received raised issues relating to retailing. In general, the retail submissions pointed to the economic imperative of shopping development taking place in Ballymun, as well as the corresponding requirement to inject much needed vibrancy into the area. Specifically, it was pointed out that over 700 people were employed in the Ballymun area and that their expenditure contribution should also be taken into account when assessing future floorspace need.

2.3 Dublin City Development Plan 2011-2017

Although the new Dublin City Development Plan is currently in draft form it is still necessary to highlight the key elements of the current Development Plan 2011-2017 as they relate to Ballymun. This is because the broad strategy and designations for the regeneration of Ballymun in the current plan still apply in the Draft Dublin City Development Plan 2016-2022.

Ballymun is designated as 1 of 8 Key District Centres (KDC) in Dublin City (see Plan map extract in Figure 2.1). The nearby Finglas Village is also a designated KDC under the Development Plan, as well as Phibsborough and Northside.

Figure 2.1 Key District Centres identified in Dublin City Development Plan 2011-17, p150 – illustrative purposes only



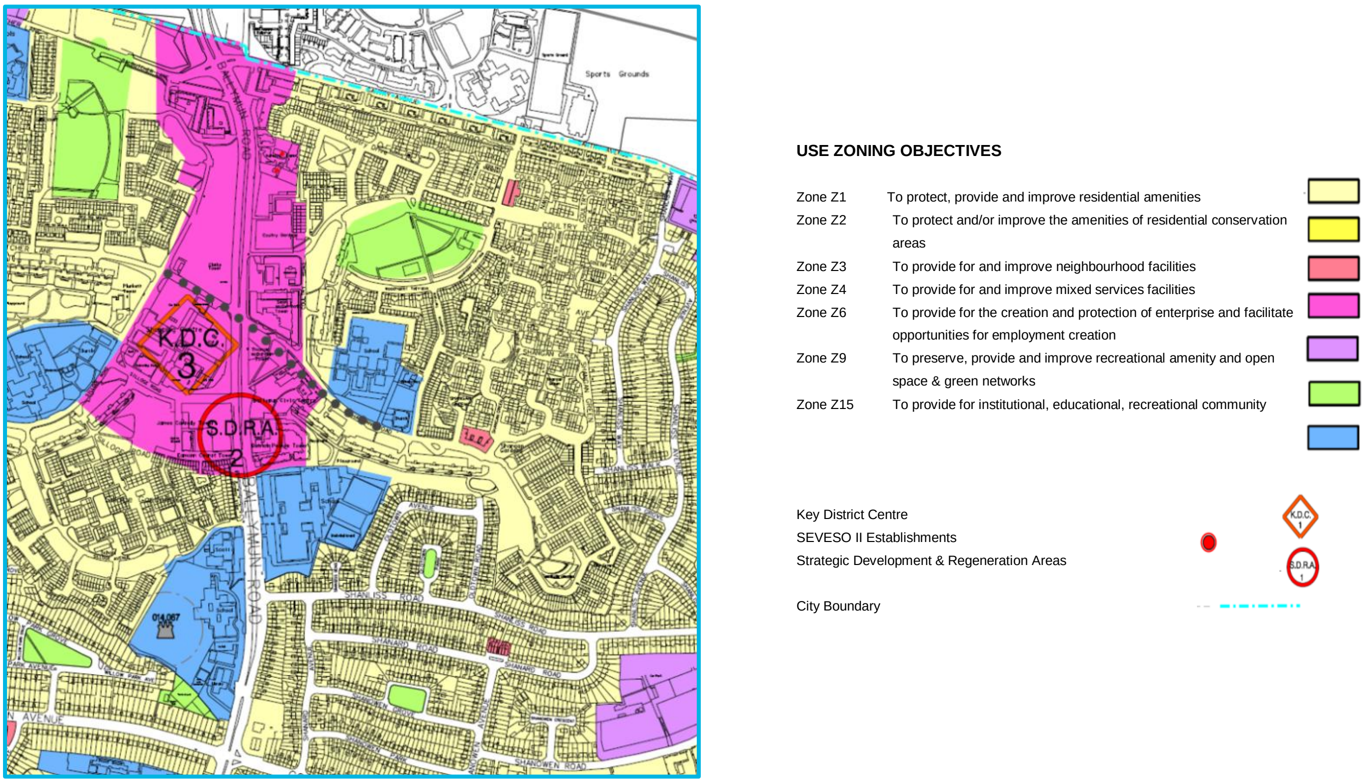
KDCs are designated as focal points for the concentration of services within a particular location. They typically accommodate retail, office, community, government and leisure/entertainment functions for the local residential population. In order to encourage investment in KDCs the Development Plan offers greater flexibility in the type and scale of uses it would countenance. For example, the floorspace cap on office size does not apply.

Furthermore, in the case of Ballymun, high density residential development is also promoted in this KDC. The civic and commercial centre of Ballymun is zoned Z4 in the Dublin City Development Plan 2011-2017 and seeks to provide and improve mixed services and facilities (Figure 2.2). Ballymun is also zoned as a Strategic Development and Regeneration Area (SDRA), the overriding objective of which is to promote regeneration via residential and employment development.

In relation to retailing specifically, the broad thrust of retail policies in the Development Plan focuses on improving shopping provision in older District Centres such as Ballymun, a crucial component of which is the development of a healthy convenience goods sector.

"In terms of the higher order or key district centres, it is possible to identify a number in need of revitalisation if they are to serve their function as key centres or hubs for the surrounding communities, for example, ***Ballymun****, Northside, Phibsborough and Rathmines. These key district centres should serve a local need, but also a broader catchment of the surrounding local community and so need to expand, diversify and upgrade the retail profile to include higher order uses and speciality shops to reflect their status as higher order centres within the retail hierarchy and to develop a distinctive retail profile within the overall retail hierarchy of Dublin City.* ***For all district centres, the revitalisation strategy should focus on achieving an amount and quality of convenience shopping to minimise outflow of expenditure and unsustainable travel patterns***" (p337, Appendix 4, Dublin City Development Plan 2011-2017).

Figure 2.2 Dublin City Development Plan 2011-2017 Ballymun Zoning map – illustrative purposes only



2.4 Fingal County Development Plan 2011-2017

Because part of the Ballymun study area lies within Fingal County Council, it is necessary to review the Fingal County Development Plan 2011-2017.

The nearby Charlestown Shopping Centre is a designated District Centre under the Fingal County Development Plan. There is also a Neighbourhood Centre in the vicinity of Gulliver's Retail Park, which is anchored by Eurospar. It has yet to be formally designated as a Neighbourhood Centre given that it opened after the preparation of the Plan.

2.5 Retail Strategy for the Greater Dublin Area 2008 – 2016

Under the Retail Strategy for the Greater Dublin Area (GDA), Ballymun, Finglas Village, OMNI Shopping Centre and Charlestown are all recognised as Level 3 Centres within the retail hierarchy. Dublin City Centre constitutes the only Level 1 Centre, followed by Level 2 Centres such as Blanchardstown, Liffey Valley and Dundrum. The neighbourhood centres and local shops are jointly viewed as Level 4 centres. Paragraph 6.33 of the GDA Retail Strategy contains the following policy for places such as Ballymun.

*"In the suburban areas, **to support** the hierarchy of retail locations (**district**, neighbourhood and local) that serves the requirements of the city population. Within this hierarchy, support of the development and expansion of the functions of the Prime Urban Centres (as locations of employment, retail, community and tertiary services) is centrally important."* P75, GDA Retail Strategy.

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

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

Types of goods	Gross lettable sq.m.*	Net sq.m#
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

2.6 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 study because of their reference to the Metro North proposal.

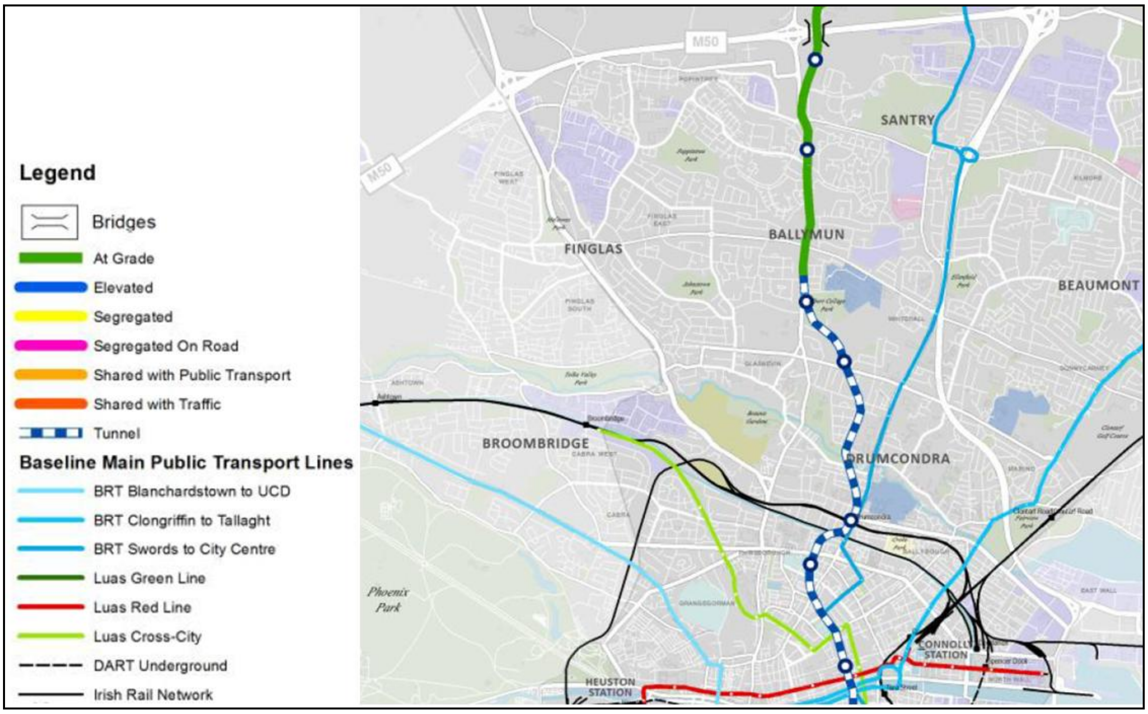
"*Metro North is planned to follow a northerly route from Stephen's Green to Swords via O'Connell St, **Ballymun** and onwards to the Airport. It is planned for use by 35 million passengers per year and to deliver a journey time of approximately 20 minutes between Stephen's Green and the Airport*." P58, RPGs for the GDA.

Additional information on the Metro North proposal has emerged in subsequent publications referred to below.

2.7 Draft Transport Strategy for the Greater Dublin Area 2011-2030

As indicated above, it is proposed that Ballymun will form part of the proposed Metro North line and a Stop will be located here. As stated in section 10.3.6 of the Draft Transport Strategy "*Metro North is a key project of the Strategy, designed to provide a high capacity public transport link serving the northern section of the city area and extending to the designated town of Swords. It also connects Dublin Airport, the main entry point into Ireland by air, to the city centre with a modern, high quality rail service.*"

Figure 2.3 Optimised Metro North (LR7) (Source: Fingal/ North Dublin Transport Study, 2014, pg. 58.) - illustrative purposes only



The draft Transport Strategy also recommends priority improvement measures for the North Orbital Quality Bus Corridor (QBC) that links Ballymun with Finglas and Blanchardstown in the west and Coolock in the east.

2.8 Fingal/North Dublin Transport Study 2014

In the Fingal/North Dublin Transport Study the Optimized Metro North is anticipated to pass at grade i.e. above ground at Ballymun (Figure 2.3). The tram and platform will be 60m in length and this is adjudged suitable to cater for a capacity throughput of 12,000 passengers per direction per hour (ppdph). Coincidentally, this number of passengers approximates to the total number of vehicles passing Ballymun on a typical weekday. Further consideration of the timing of this Metro North proposal will therefore be needed, once more detail on the proposal is known

2.9 Ballymun Masterplan 1998 & 2007

Although the Masterplan is a non-statutory document it reflects the aspirations of the local community given the consultation undertaken and is one of the planning documents which the Dublin City Development Plan has regard to – see Appendix 1 of the DCC Development Plan 2011-2017 . The initial 1998 Masterplan was formulated to assist with the regeneration of the area, which involved the demolition of 36 no. high rise residential blocks. The Masterplan project map was updated in 2007 and, some of its priorities still resonate today. These include a desire for traffic calming measures, clustering of public services and the introduction of private sector incentives.

2.10 Ballymun Economic Plan 2015 (Draft)

The Ballymun Economic Plan identifies 5 key strategic goals for economic development in Ballymun over the next five years. Two of these are partly related to the findings of the Retail Study, namely the "Development of sites for economic development" and the "Reactivation of unused space". As far as the Retail Study is concerned (see Section 7.0 later) the former goal clearly pertains to the opportunity for the redevelopment of the redundant shopping centre site and the sequential appraisal of sites for retail development beyond this. The latter strategic goal relates to the vacant units existing on the main street and in the neighbourhood centres, wherein the Retail Study advocates maximum flexibility in the uses and incentives permitted in order to encourage their occupation.

2.11 Planning history on existing and proposed retail sites

A 10 year planning permission on the site of the former Ballymun Shopping Centre was granted in 2009 (Ref 4828/08) for a mixed use development in excess of a quarter of a million sq.ft. Certain similar leisure elements of the proposal have however now opened (cineplex) or are due to open (bowling alley) at the nearby Charlestown Shopping Centre in Fingal County Council. Two thousand car parking spaces were proposed as part of the planning permission and were to be integrated with an underground Metro stop, which the Fingal/North Dublin Transport Study 2014 now indicates will be above ground. This permission for the redevelopment of Ballymun Shopping Centre was proposed during the Celtic Tiger years and a scheme of its scale would likely fail to secure investment in the current era of austerity and restricted lending. It is due to expire in 2019.

Immediately north of the above site there is an expression on interest to provide an anchor food store within a mixed use four storey structure (to include office space).

2.12 Conclusion

The zoned Z4 lands in Ballymun Key District Centre afford opportunities for significant retail investment. The Dublin City Development Plan 2011-2017 particularly cites the need to ensure that a strong convenience goods sector develops in District Centres, in the interest of minimizing expenditure leakage and promoting sustainable transport modes. Balanced against the desire to bolster shopping provision, however, national guidance stipulates that District Centres should not become retail destinations in their own right. Clearly, when assessing the future need for retailing in Ballymun, there is a requirement for the Retail Study to recognise the aspirations of both national and local planning guidance.

Existing Retail Environment

03

Existing Retail Environment

3.1 Introduction

This section of the Retail Study reviews existing shopping provision in Ballymun and considers its competitive relationship with surrounding retail centres.

3.2 Retail categories

When seeking to review the existing retail environment it is first necessary to appreciate how shops are categorised. For the purposes of urban and rural planning, 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 Retail hierarchy

As identified in the Retail Strategy for the Greater Dublin Area, the District Centre of Ballymun is considered a Level 3 centre within the retail hierarchy that exists in Dublin.

Level 1 – Dublin City Centre;

Level 2 – Blanchardstown;

Level 3 – **Ballymun**, Finglas, OMNI Shopping Centre, Charlestown Shopping Centre.

Level 4 – Neighbourhood Centres (Poppintree, Coultry, Sillogue & Shangan) & local centres.

In addition to the above there are other retail locations that have not been classified in the Retail Strategy for the GDA but which function on a par with the Level 3 and 4 centres indicated. These include:

- Clearwater retail park (anchored by a Tesco superstore);
- Aldi and Lidl (both have stores in Finglas and Santry);
- Gulliver's Retail Park and Neighbourhood Centre; and
- IKEA.

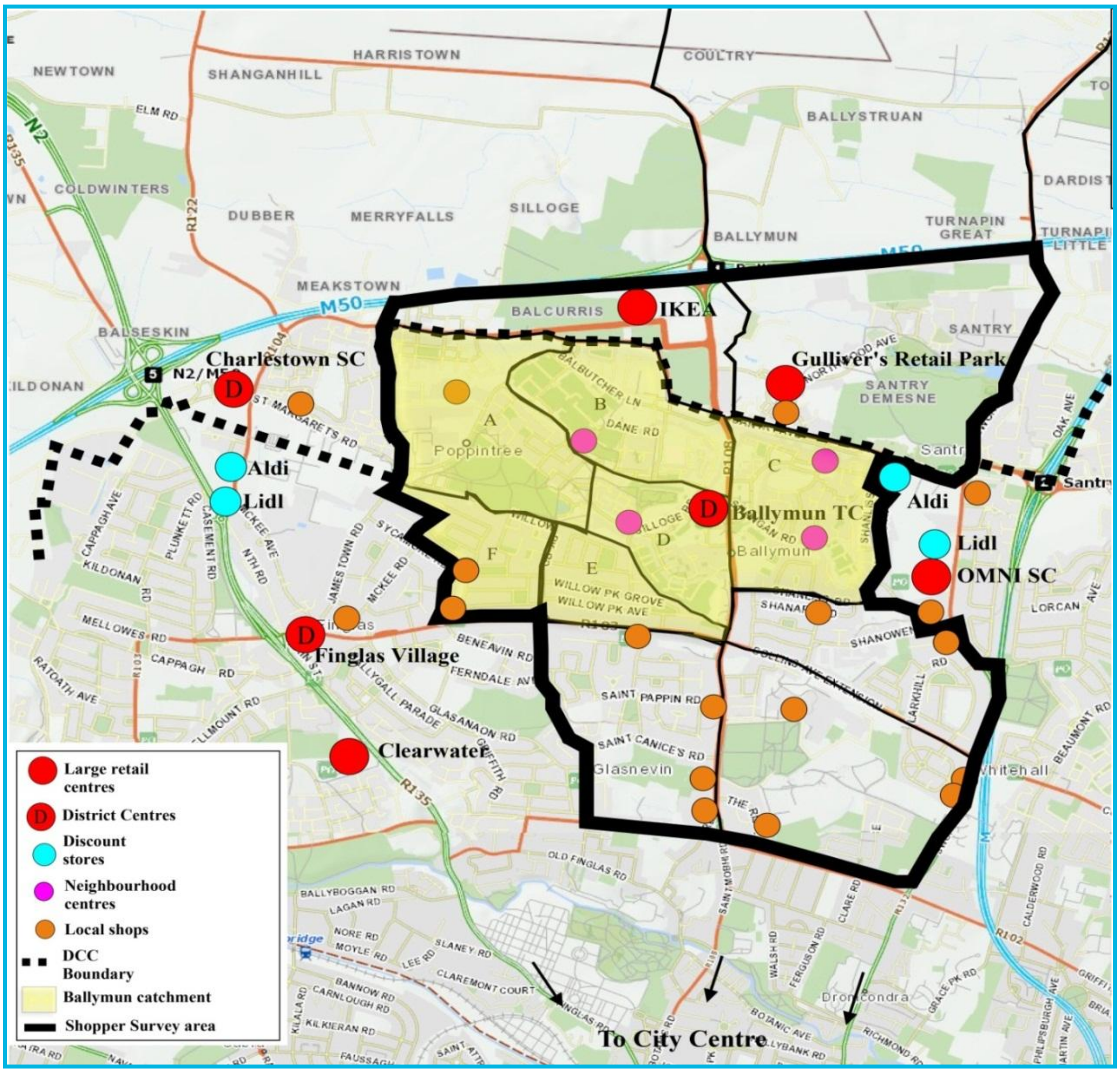
The distribution of these retail locations is displayed in Figure 3.1. The map shows the location of retail facilities in the general area ranging from the large retail centres to local shops. They are all located within 5-10 minutes' drive of Ballymun Main Street and cater for the residents of Ballymun, Glasnevin, Santry, Whitehall and Finglas. Three of the seven large retail centres in the general area, namely Charlestown Shopping Centre, IKEA and Gulliver's Retail Park, are located within Fingal County Council.

The actual retail catchment of Ballymun is assumed to include all the Electoral Divisions (EDs) labelled Ballymun A to F (shaded transparent yellow in Figure 3.1). This is the area within which retail floorspace need is calculated in Section 5.0 of the Retail Study. It is reasonable to contend that Ballymun is, at the very least, entitled to compete for a share of retail expenditure within its own electoral area.

Figure 3.1 also displays the geographical extent of the household shopper survey area (referenced in Section 4.0 as the study area). It was demarcated to include additional areas, such as North Glasnevin, that are within convenient reach of Ballymun and from where people might either visit or pass through Ballymun. The identification of a survey area allows for the assessment of potential expenditure inflow into the Ballymun catchment area.

It is estimated that the catchment presently contains a total of 2,832 net sq.m. of convenience goods floorspace and little comparison goods floorspace, save for pharmacies and a number of charity shops. A review of shopping facilities in all these centres is outlined below.

Figure 3.1 Distribution of retail facilities within 5-10 minutes' drive of Ballymun Main Street and the geographical extent of the household shopper survey area and Ballymun Electoral Divisions (EDs) – illustrative purposes only



Ballymun

Shopping in Ballymun is located along its main street and within two nodes of commercial activity that have congregated at the intersections of the road network.

The largest node (Figures 3.2 and 3.3) extends from the intersection of the Shangan Road and Balbutcher Lane Lower to Gateway Crescent. Essentially four mixed use building blocks are assembled in this area, including: the Plaza, Civic Centre, College View and the former Shopping Centre. Retail use occupies a number of the ground floor units in these buildings.

The second commercial node is located south of Santry Avenue and is known as Santry Cross. It forms part of mainly high rise residential development (Santry Cross) and the Metro Hotel. Compared to the large commercial node above it accommodates little retail use.

In addition to Ballymun Main Street there are four local neighbourhood centres located within Ballymun housing areas at:

- Shangan;
- Poppintree;
- Sillogue; and
- Coultry.

In terms of convenience goods shopping Ballymun is equipped with a Supervalu store at College View in the large commercial node. It comprises a gross floor area of approximately 1,400 gross sq m (circa 15,000 sq ft) and incorporates the relocated post office from the former shopping centre. The store relies on adjacent off-street parking and neighbouring parking spaces still available on the site of the former shopping centre.

Other shops selling convenience goods on and immediately off Ballymun Main Street include a Centra store on Shangan Road and an Eastern European food outlet at Santry Cross.

With the recent demise of Ballymun Shopping Centre, which first opened in 1969, there is little comparison goods shopping remaining in Ballymun. As one of the oldest shopping centres in the area its trading viability soon deteriorated. This was exacerbated by the departure of its anchor store, Tesco, in April 2014 and by competition from neighbourng retail centres and freestanding foodstores. Tesco could afford to sacrifice its anchor role in Ballymun Shopping Centre because it enjoyed a market share in the general area via its stores in Clearwater (redeveloped in 2001) and OMNI (trading since 1991).

With the departure of Tesco, convenience goods retailing in the Ballymun area, including its neighbourhood centres, is essentially provided by outlets aligned to the wholesaler Musgraves, namely Supervalu, Centra and Daybreak. Incidentally, mindful of the prevalence of these Musgraves' units, the latest 2015 data for the country as a whole indicates that the market share of Supervalu (24.3%) lies just behind Tesco (24.8%) and above Dunnes (22.7%), Lidl and Aldi (both circa 9%).

Figure 3.2
Ballymun's largest node of retail activity

AECOM's survey of commercial uses in Ballymun demonstrated high levels of vacancy, allied with low levels of diversity of the retail offer. A prevalence of beauty salons and pharmacies was apparent in place of the range of comparison goods shops that could potentially be available, such as high street fashion stores and other speciality shops.

Figure 3.3 Survey of uses in Ballymun's two Commercial Nodes – illustrative purposes only

Finglas Village Centre

Convenience goods shopping in Finglas Village is principally provided by Supervalu, Iceland and Mace, as well as the nearby Aldi and Lidl stores. Direct vehicular access off the N2 contributes to congestion in the village centre during peak travel times. Despite a limited range of comparison goods shops available, a number of them, namely the electrical retailer Power City, is highly popular with residents in Ballymun.

Figure 3.4 Finglas Village Centre

OMNI Park Shopping Centre

OMNI Park Shopping Centre is the largest retail centre in the general area of Ballymun, with 23,225 gross retail sq. m. and 1,500 free parking spaces. Opening in 1991 it comprises over 60 units and is anchored by Tesco (3,700 gross sq.m.) and Penneys (2,300 gross sq.m.) with the latter proving a big draw for shoppers. It also has a retail park accommodating Argos, Peacocks and others, as well as an 11 screen cinema and, more recently, a Lidl store. The fast food operators McDonald's and KFC both trade here. The on-site facilitation of a dedicated taxi rank is testament to the popularity of the centre. There is a bus service from Ballymun taking elderly residents to shop at OMNI. The venue has an all-day appeal, with the trade of the cinema and eateries at night complementing the daytime trade of the shopping mall. Together with the Jervis Centre in Dublin City Centre, it is the only shopping centre in the Dublin City Council area that has a credit rating of AAA, which means it is financially robust and attractive for investment (source: DTZ Sherry Fitzgerald 2013).

Figure 3.5 OMNI Shopping Centre

Charlestown Shopping Centre

Charlestown Shopping Centre opened in 2007 and has a gross floorspace of 16,000 sq m, of which 7,000 gross sq m is allocated to the anchor tenant Dunnes Stores. Comprising in the region of 30 shops it currently has 300 surface car parking spaces and 500 basement parking spaces. Parking is free for the first 2 hours and €1.50 per hour thereafter. McDonalds and KFC also operate in freestanding premises nearby. In October 2015 a 9 screen Odeon Cinema commenced trading. Like OMNI, the development of a cinema and planned opening in December 2015 of connecting eateries (Starbucks, TGI Friday) will result in an all-day commercial offer. This all day appeal will be further strengthened by the planned opening in 2016 of a 40,000 sq ft leisureplex, which will include ten pin bowling. Furthermore, the original concept plan for the site, together with discussions with the centre manager, indicate that a number of retail warehouse units may constitute a third and final phase of development at Charlestown in the area of the existing surface car park, though planning permission has yet to be obtained for this.

Figure 3.6 Charlestown Shopping Centre

Clearwater Retail Park

Clearwater Retail Park was redeveloped in 2001 and comprises in excess of 12,000 gross sq.m. It is anchored by a Tesco Extra store (9,000 gross sq.m.), 40% of which is assigned to the sale of household durables. There are 6 small units (newspaper outlet, butcher, pharmacy, barbers, beauty salon and medical unit) adjoining Tesco, together with a standalone filling station. In addition there is a separate group of 3 retail warehouses (DID, Petshop and bed shop) totaling 2,900 gross sq.m., as well as freestanding Burger King and Costa Coffee units in the complex.

It has direct access off the N2 via a signalised right turning lane and free parking for 560 vehicles.

Figure 3.7a Clearwater Retail Park – Foodstore

Figure 3.7b Clearwater Retail Park – Retail warehousing

Gulliver’s Retail Park

The 14,000 gross sq m retail park and standalone neighbourhood centre (1,700 gross sq m) opened in 2006/2007. It has 600 free parking spaces and is the nearest competing centre to Ballymun. The retail park is anchored by Homebase and other tenants include

Toybox, Hickeys Home Focus, Petmania, Eco Interiors and a Furniture Liquidator unit. One of the original occupants of the retail park (Curry's) has since relocated to Airside Retail Park. The neighbourhood centre is anchored by Eurospar (circa 740 gross sq.m. on the groundfloor) and contains an in-house Subway outlet. In addition to Eurospar, the neighbourhood centre accommodates Costa Coffee, a medical unit & pharmacy, dry cleaners and a beauty salon. There is also a free-standing drive-thru McDonald's fast food restaurant to the rear of Eurospar.

Figure 3.8a Gulliver's Retail Park and Neighbourhood Centre

Figure 3.8b Occupants of Gulliver's Retail Park and Neighbourhood Centre

IKEA

Having opened in 2009 the 32,000 gross sq m store has 1,850 free parking spaces. IKEA disclosed that some 18 per cent of its 520 strong workforce (over 90 employees) comes from Ballymun – a figure which is testament to the close working relationship IKEA had with Ballymun Regeneration Limited and Ballymun Job Centre. It is located on land zoned for retail warehousing in the Fingal County Development Plan 2011-2017 and is estimated to attract around 2.5 million visitors a year. Its national appeal is illustrated in the addresses revealed by the AECOM vehicle licence plate surveys carried out over two days for this study (see Appendix 1) Discussions with IKEA indicate that its primary catchment generally correlates with a 20 minute drive band and comprises the counties of Dublin, Meath, Louth, Kildare and Wicklow. Approximately 80% of its customer trade comes from these counties. As a measure of its success, trade has increased by over 10 per cent between September 2014 and September 2015.

Figure 3.9 Ballymun IKEA

The overall amount of retail floorspace and parking provision in the foregoing retail centres is outlined in Table 3.1.

Table 3.1: *Summary information on the main retailing centres*

Shopping Centres	Size (gsm)	Parking Spaces
Ballymun	4,000	450 free/pay*
OMNI	23,225	1,500 free
Charlestown	16,000	800 pay
Clearwater	12,000	560 free
Gulliver's	15,700	600 free
Ikea	32,000	1,850 free

**Note – this excludes the 200 mainly residential & private spaces at Santry Cross*

Aldi

There are two Aldi stores within convenient drive time distance of Ballymun – at St Margaret's Road and at Santry Avenue. They are standardised convenience stores (circa 1,500 gross sq m) that concentrate on selling limited product lines in bulk. Both are very popular with high parking occupancy rates observed at the weekends. The St Margaret's Road store shares its parking area with a row of local shops and services.

Lidl

As with Aldi, Lidl also has two stores that are within convenient drive time reach of Ballymun. However, unlike the Aldi stores, which would benefit from right-turning lanes, convenient access to Lidl's properties exists from a roundabout on St Margaret's Road and via traffic signals at OMNI Shopping Centre.

Figure 3.10 Lidl St Margaret's Road, Finglas

Neighbourhood Centres - Ballymun

There are 4 purpose built neighbourhood centres (NCs) dispersed throughout Ballymun - Poppintree, Sillogue, Coultry and Shangan. Three of these are anchored by retail chains affiliated to Musgraves, namely Centra and Daybreak.

The four NCs in the Ballymun area are mainly intended to provide locally accessible retail services to residents, particularly the less mobile members of the community. This is in keeping with the role identified for them at the national level:

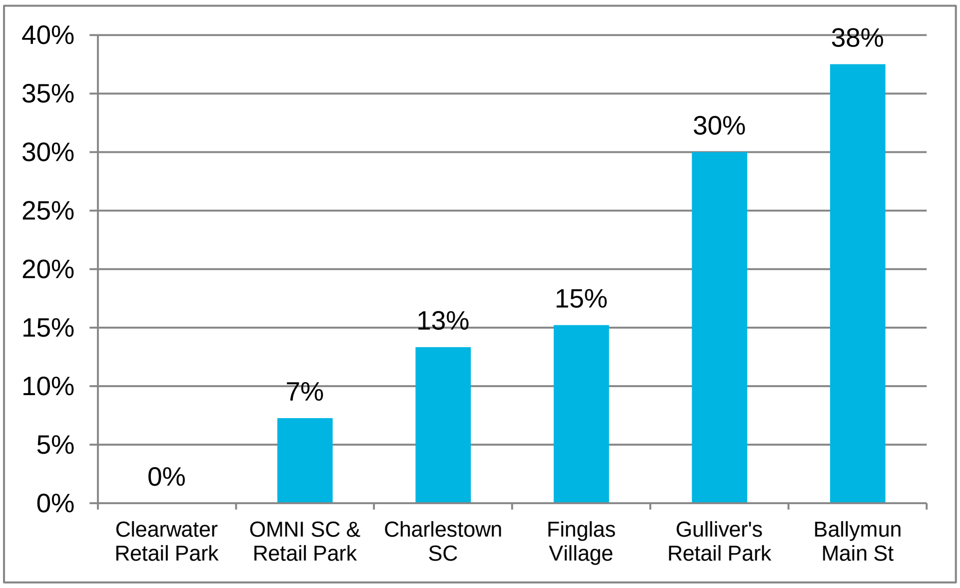
"*Local retail units such as corner shops or shops located in local or neighbourhood centres serving local residential districts perform an important function in urban areas. Where a planning authority can substantiate the local importance of such units in defined local centres, they should safeguard them in development plans, through appropriate land-use zoning. Development management decisions should support the provision of such units, particularly where they encompass both food-stores and important non-food outlets such as retail pharmacies, and have significant social and economic functions in improving* ***access to local facilities especially for the elderly and persons with mobility impairments, families with small children, and those without access to private transport***" (Section 4.11.6, Retail Planning Guidelines)

3.3 Health of existing centres

Vacancy rates

The most significant indicator of the health of existing centres is the level of vacancy. Reference to Figure 3.11 reveals that the highest level of vacancy (38% of all units) is observed in Main Street, Ballymun. In some respects this rate is skewed by the preponderance of vacant units (9 units) to the rear of Ballymun Plaza on Coultry Road. Their omission from calculations would reduce the vacancy rate to 25%. In contrast to Ballymun Main Street, low vacancy rates at Clearwater and OMNI are symptomatic of buoyant trade. Also, discussions with the Manager of Charlestown Shopping Centre would suggest that contracts for the occupancy of its four vacant units, which accounts for a 13% vacancy rate, are near completion.

Figure 3.11 Percentage of vacant units in large retail centres



The Ballymun vacancy figure includes all those units contained within the four purpose-built mixed use developments known as College View, the Plaza, Civic Centre and Santry Cross. They contain 48 units the majority of which (over 80%) are privately owned.

Vacancy levels at Santry Cross, which constitutes the smaller commercial node with Ballymun District Centre, are particularly pronounced (see Figures 3.12a & 3.12b).

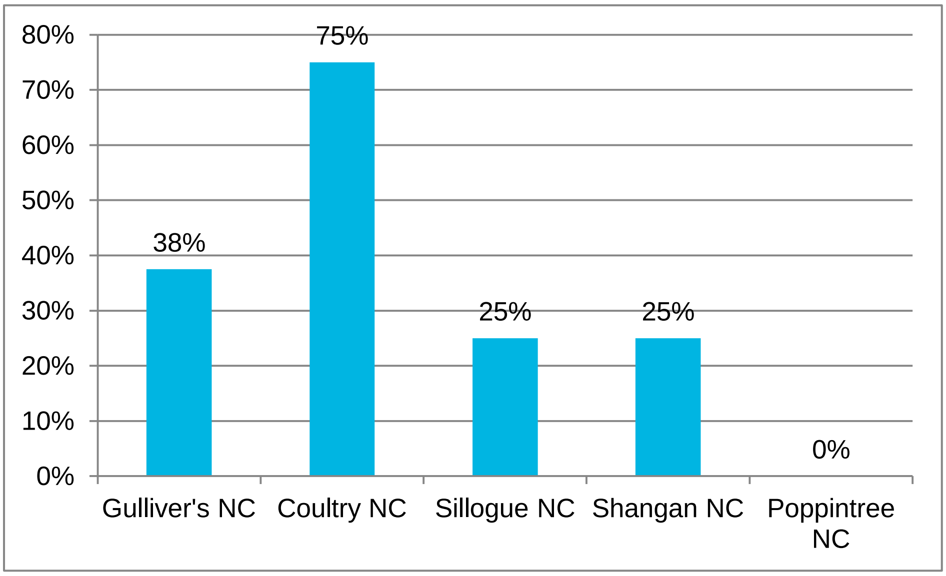

Figure 3.12a Vacancies at Santry Cross


Figure 3.12b Vacancies at Santry Cross

It is noted that another three units at Santry Cross are likely to become vacant in the near future. One unit is currently housing Pieta House on a temporary basis and is likely to become vacant in the first half of 2016. In addition, the two eco units are likely to become vacant in early 2017 with their transfer to the boiler house site, which is being redeveloped to accommodate the relocation of the Discovery Centre.

With the exception of the Eurospar anchored Neighbourhood Centre at Gulliver's Retail Park, which comprises 8 units, most Neighbourhood Centres in Ballymun contain between 4 and 5 units. Figure 3.13 shows that Poppintree NC is performing best with zero vacancies and Coultry NC is the poorest, with three quarters of its units vacant. The NCs at Sillogue and Shangan each have one unit vacant. Latest information indicates that a café may open at Coultry NC subject to planning permission being granted.

Figure 3.13 Percentage of vacant units in Neighbourhood Centres



The plight of Ballymun neighbourhood centres is no different to that of similar centres elsewhere. They suffer from the combined effects of the centralisation of retailing into fewer larger units and centres, plus the growing appeal of stop and shop filling stations. Nevertheless, they do still perform a vital local service and their contribution in this regard remains important.

Rental values

Rental values also provide an indication of the appeal of a retail location but they vary considerably according to a range of factors, including:

- the size and specific location of the unit e.g. a unit located near an anchor unit will pay appreciably more rent;
- the type of shopping taking place within the unit e.g. foodstore versus retail warehousing; and
- the anticipated turnover of the unit. This applies mostly to units within shopping centres but in today's depressed market it is a significant consideration for occupancy of any unit.

Mindful of these variations it is sufficient to state that the highest rents are charged at OMNI (in excess of €35 psf), then Charlestown (circa €30 psf), with an approximate rental range of between €25 and €30 psf characterising centres like Ballymun Main Street and Finglas Village Centre.

3.4 Conclusion

Not surprisingly, given the demise of Ballymun Shopping centre, a limited range of shopping provision is now available in Ballymun. At present, there is only one brand of food retailing on offer in the area, namely shops aligned to the Musgraves grocery wholesaler. There is also a near total absence of comparison goods retailing, the most salient indicators of which are vacant units and the stark lack of Main Street vitality at weekends. Added to this, it is evident that Ballymun is facing significant shopping competition from surrounding retail centres. Against this background, therefore, the succeeding sections of this Retail Study seek to ascertain if there is any potential for Ballymun to recover some of this lost retailing ground.

PART B: Household Shopper Survey

04

Household Shopper Survey

4.1 Introduction

An integral component of the study involved the carrying out of a household shopper survey of the Ballymun and north Glasnevin area. It was targeted at acquiring facts on shopper behaviour and obtaining views from the local shopping public. Gathering this information was critical for a comprehensive and robust understanding of shopping patterns in the area.

4.2 Methodology

The survey involved the commissioning of an independent research body, Strategic Marketing, to carry out a landline and mobile telephone survey of 400 shopper households in the study area. It was based on a stratified random sample of the population residing in the 6 Ballymun electoral divisions (EDs) named Ballymun A-F and the 4 neighbouring EDs (Ballygal C, Whitehall A, Whitehall B and Airport). A map showing the geographical coverage of these EDs is contained in Section 3.0 (Figure 3.1).

The number of persons surveyed from each ED is shown in Table 4.1. The number in each had regard to the population size found therein and was weighted in favour of the Ballymun EDs so as not to skew the overall results. In terms of its reliability, the sample size accords with a 95 per cent confidence level, resulting in only a standard 5 per cent margin for error in the findings. The sample size of 400 also needs to be appreciated against a February 2015 survey of 1600 shoppers by the National Transport Authority (NTA) for the whole of Dublin City Centre.

Table 4.1: Number of interviewees in each Electoral Division (based on 2011 Census figures)

Council	Local Electoral Division	No. of Interviewees	2011 Population
Dublin City	Ballymun A	53	3,678
Dublin City	Ballymun B	62	4,012
Dublin City	Ballymun C	88	5,585
Dublin City	Ballymun D	38	2,961
Dublin City	Ballymun E	25	1,582
Dublin City	Ballymun F	37	2,323
Dublin City	Ballygal C	33	3,419
Dublin City	Whitehall A	22	3,545
Dublin City	Whitehall B	29	3,892
Fingal CoCo	Airport	13	4,032
	Total	**400**	**35,029**

Questionnaire

The survey consisted of 23 questions to be completed during a 15-20 minute phone call (a copy of the questionnaire is attached in Appendix 2). The questions were aimed at identifying shopper profiles, garnering shoppers' views and eliciting facts on shopper behaviour. The latter was especially important for the identification of shopping patterns in the area, in terms of establishing where people were shopping for their groceries and non-food items.

Results

Aggregate results were provided for the sample size as a whole, together with detailed results for each of the EDs surveyed. Three quarters of the respondents were female. A summary of the key findings is separately documented below for convenience goods shopping and comparison goods shopping, while a breakdown of the full tabulated recordings is included in Appendix 3.

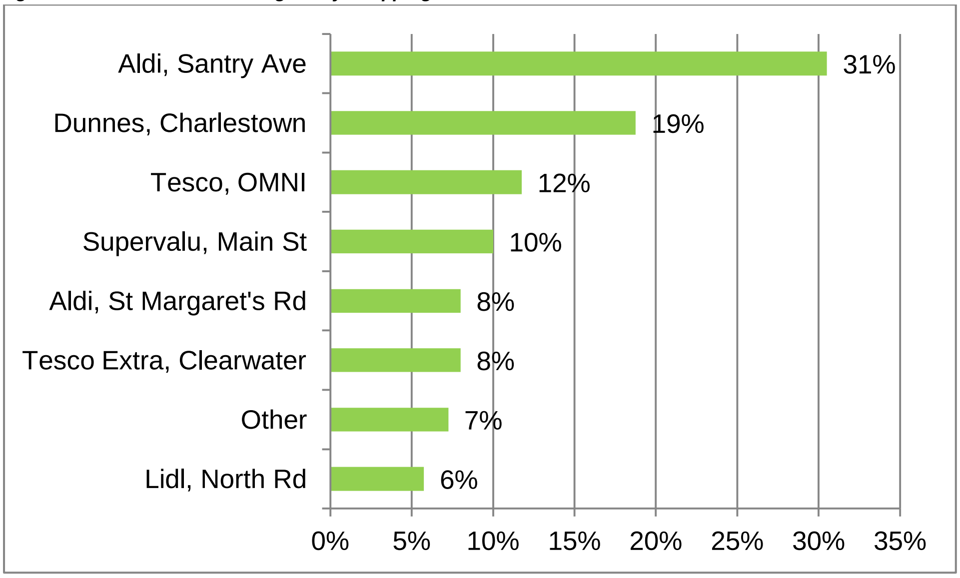
4.3 Convenience goods shopping

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

Main food shopping location

The survey revealed that Aldi in Santry Avenue is the most popular foodstore (31% of respondents cited it as their main foodstore) followed by Dunnes at Charlestown (19%), Tesco at OMNI (12%) and Supervalu on Ballymun Main Street (10%). Aldi in Santry Avenue attracts residents from Glasnevin Avenue (21%) and north of Collins Avenue Extension (34%).The full list of recordings is shown in Figure 4.1.

Figure 4.1 Main destination for grocery shopping

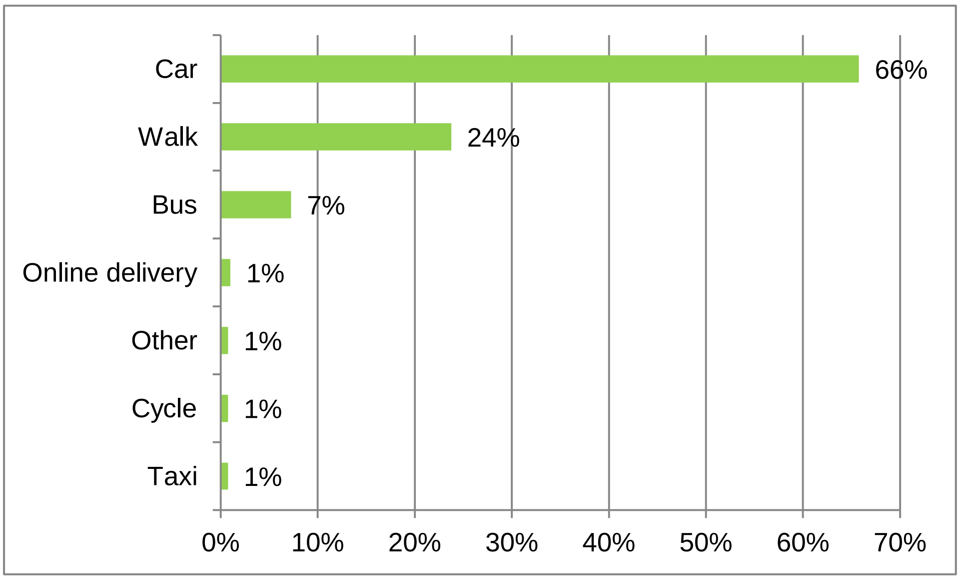


Based on the above findings, together with the results for top-up shopping (see later in this section) it can be estimated that at least **75 per cent of expenditure on convenience goods** leaks from the Ballymun catchment to competing nearby shopping locations.

Mode of travel & Journey time

In keeping with national trends the car is the most popular form of transport for food shopping trips (66%), followed by walking (24%) and bus (7%). The high incidence of walking reflects the comparatively low level of car ownership in Ballymun and in Dublin City generally. According to the 2011 census the proportion of households without a car in Dublin City was more than twice the national average (38.2% v 17.6%).

Figure 4.2 Mode of travel for convenience goods shopping



The overriding majority of food trips (83%) takes 15 minutes or less to undertake.

Reason for store selection

Convenience is the main reason for food shopping at a particular location (53%). Reasonable price is next highest reason (33%), which may help to explain the popularity of the Aldi store at Santry Avenue.

Relationship with other shops

When undertaking the main food shopping trip 31% of respondents stated they visited other food shops, with less than a quarter (23%) visiting other non-food shops.

Only 5% stated that they visited eateries when shopping for groceries, which is not surprising due to need to refrigerate chilled/frozen goods that have been purchased.

Expenditure

The survey results suggest that 6 in 10 households in Ballymun spend approximately €80 on their weekly food bill, which, when divided by the average household size of 2.7, equates to €30 per head. While this level of expenditure is below the national average key retailers in the area universally verified this figure and the low purchasing power in Ballymun generally.

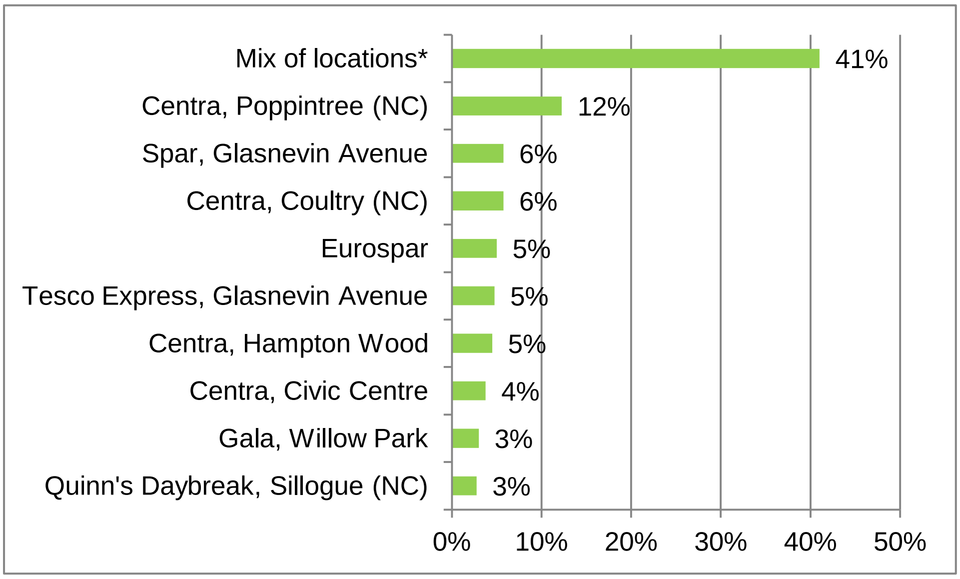
Online shopping

Approximately 5% of people in the survey area shop online for their groceries. Data from Eurostat in 2012 recorded that 6% of people in Ireland shopped online for groceries, which was double the figure in 2008 (3%). Equivalent figures for the UK estimate this type of online shopping at 7.5%.

Top-up convenience goods locations

When top-up shopping for everyday items such as newspapers, milk and bread 4 in 10 shoppers avail of a mix of locations, including those retail centres where they undertake their weekly shopping trip (Figure 4.3). This particularly applies to the Supervalu store on Ballymun Main Street, with a fair proportion of those surveyed (54 persons) stating that they also do their top-up shopping there.

Figure 4.3 Location of top-up convenience goods shopping



*Note: * includes shops where main weekly shopping is also carried out*

Figure 4.3 also illustrates that the Centra store at Poppintree Neighbourhood Centre (12%) is twice as popular as other Neighbourhood Centres for top-up shopping.

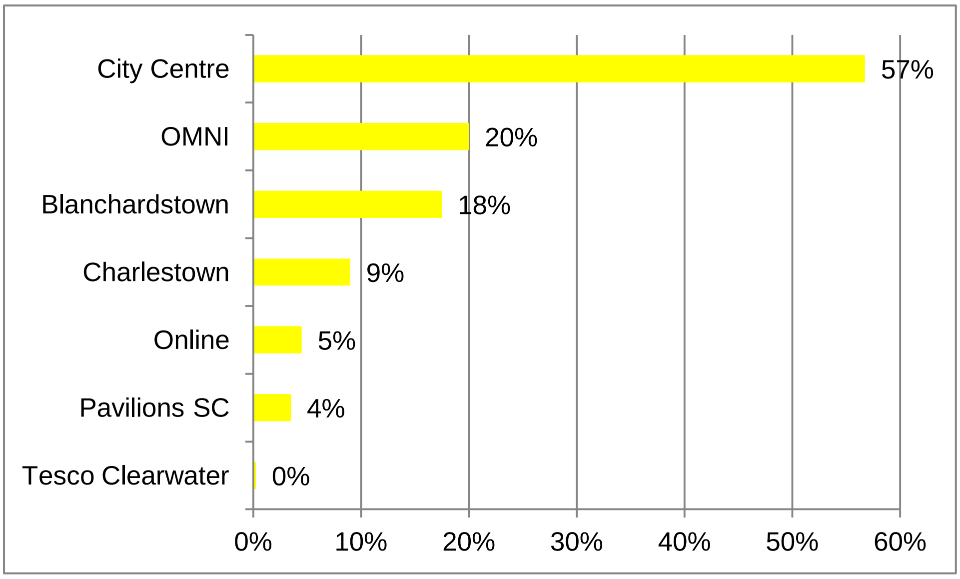
4.4 Comparison goods shopping

The chief 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 (57%) followed by OMNI (20%), Blanchardstown (18%) and then Charlestown (9%).

Figure 4.4 Main destination for comparison goods shopping

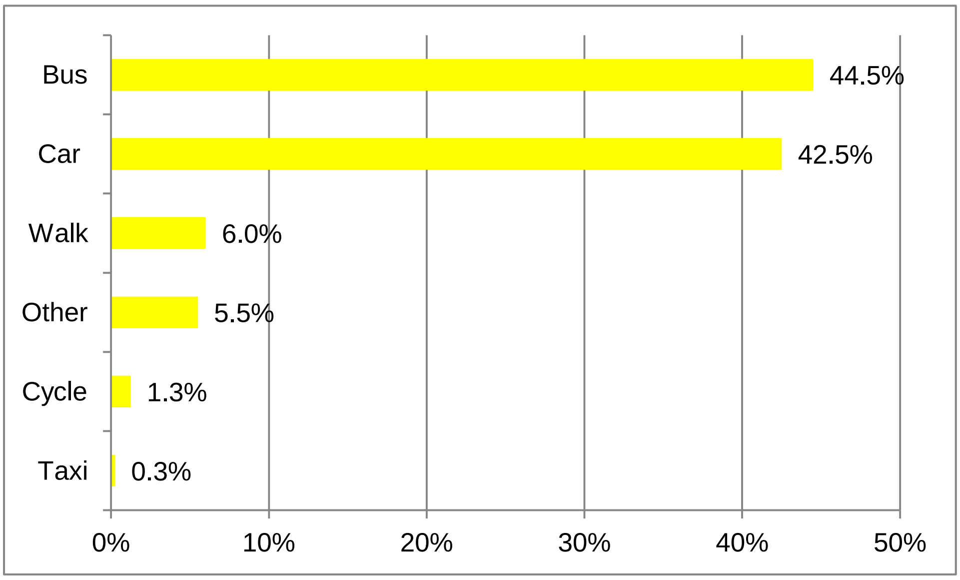


Not surprisingly, Ballymun Main Street does not feature in the findings, as currently there are very few comparison goods shops trading there. This in part can be attributed to the demise of the Shopping Centre. Indeed, it can be estimated from the survey findings that the vast bulk of this type of retail expenditure (in excess of 90%) leaks to competing centres outside Ballymun.

Mode of travel & Journey time

Given the attractiveness of Dublin City Centre for comparison goods shopping it is not unusual to find that 45% of respondents in Ballymun travel by bus for such trips. This finding resonates with a February 2015 National Transport Authority survey of City Centre shoppers which recorded that 42% of people arrived by bus.

Figure 4.5 Mode of travel for comparison goods shopping



Understandably, therefore, the Ballymun survey recorded that journey times for comparison goods shopping are longer than for convenience goods shopping trips (i.e. half take between 15 and 30 minutes).

Reason for store selection

Comparison goods shopping involves comparing the quality and price of goods. As expected therefore the range of goods was cited as the main reason (61%) for choosing to shop at a particular location. It far exceeds the next important factor of convenience (25%).

Relationship with other shops

When shopping for comparison goods 32% of people also go for something to eat or drink. This finding correlates with the 2012 online survey conducted by DCC which noted that visitors to Dublin City Centre rated eating out as highly as shopping.

Bulky goods shopping

The survey revealed that locations which accommodate the grouping of large retail units, such as Airside Retail Park, represent the greatest attraction for bulky goods shoppers. In respect of electrical items specifically, Power City in Finglas proved exceptionally popular with residents of Ballymun.

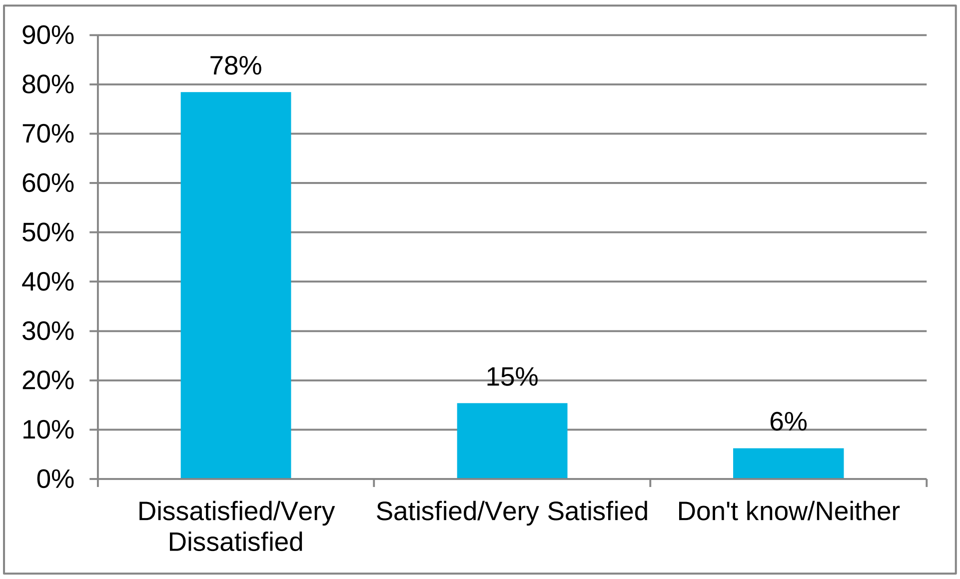
Online shopping

As with convenience goods shopping approximately 5% of shoppers stated that they did the bulk of their non-food shopping online. When probed later on the percentage of money spent online (Q15) it became evident that a quarter of respondents carried out an ancillary proportion (circa a tenth) of their comparison goods retailing on the internet. This is in keeping with the Eurostat data for 2012, which recorded that 26% of people in Ireland shopped online for some of their clothes and shoes. Interestingly, Eurostat recorded that this 26% figure was more than double the 2008 figure (11%).

4.5 Views on shopping

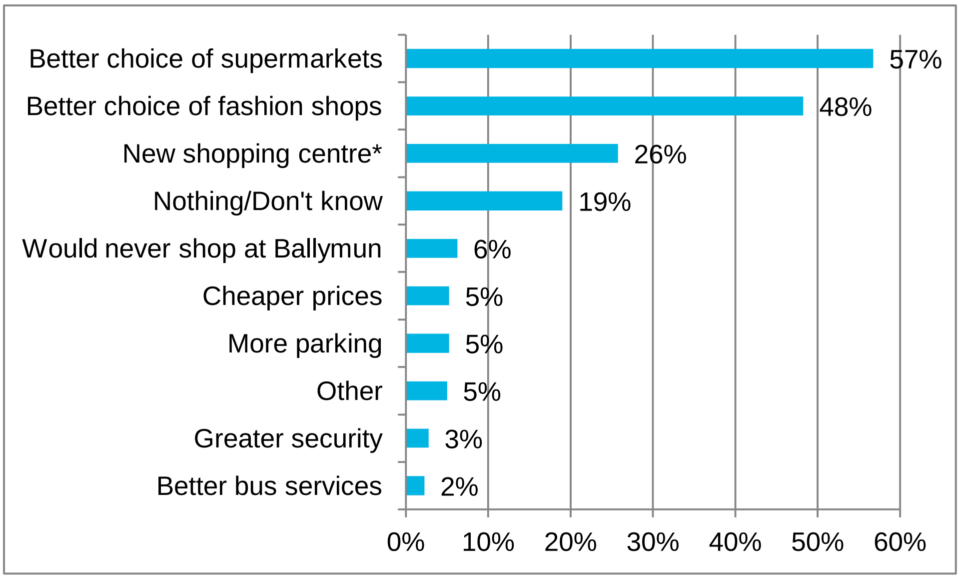
Of those people who shop in Ballymun only 15% stated that they were satisfied/very satisfied with shopping facilities, with most (78%) expressing dissatisfaction (see Figure 4.6). Perhaps as a reflection of its current lack of appeal approximately 8 out of every 10 shoppers surveyed in those areas outside of the Ballymun electoral divisions A-D said they never shopped in Ballymun.

Figure 4.6 Opinion on existing shopping in Ballymun



The limited range of shopping available was the most common reason for peoples' dissatisfaction. Consequently, when questioned on how shopping could be improved, **half the respondents cited the need for more shops**, with a quarter expressly stating the need for a new shopping centre (see Figure 4.7). The fact that half of the interviewees expressly cited a demand for more retailing is quite important. Based on this finding it can be inferred that new retail development in Ballymun has the potential to claw back half of the expenditure that is leaking to other centres.

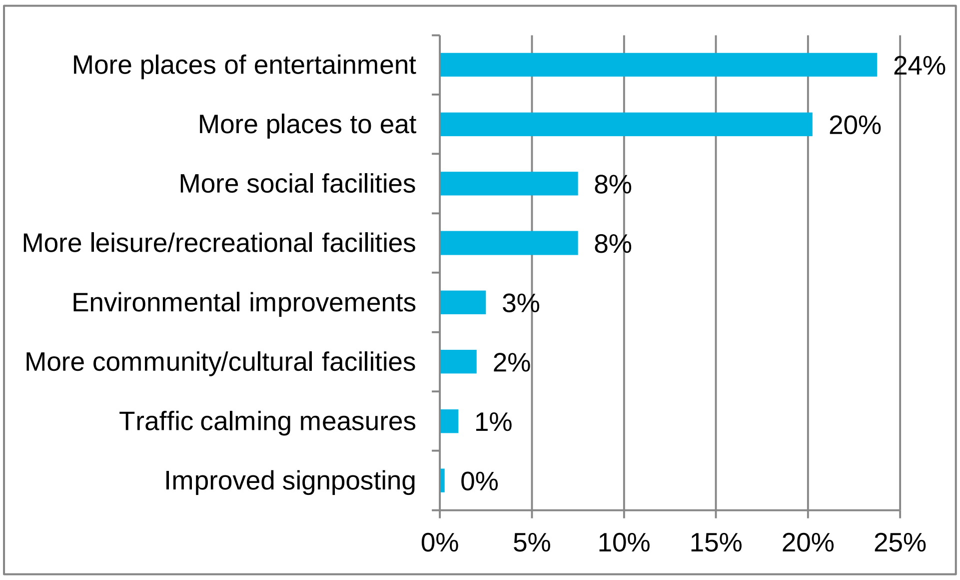
Figure 4.7 Suggestions to improve shopping in Ballymun



*Note: * this response is disaggregated from the "other" category and was stated without any prompting*

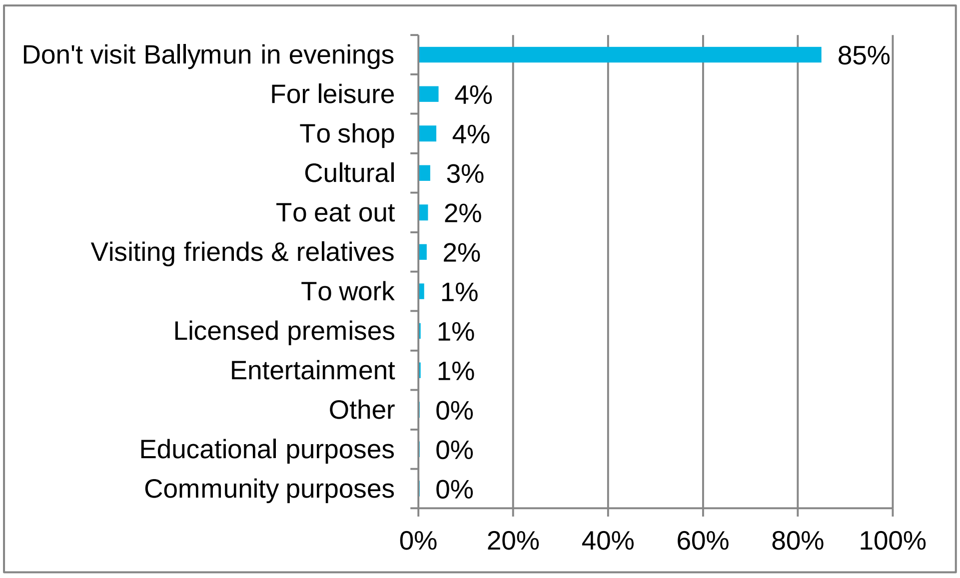
Other than new shopping facilities a fair proportion of people stated the need for new places of entertainment, notably a cinema (24%) and places to eat and drink (20%) such as a coffee house and family friendly restaurant (see Figure 4.8). The social facilities cited by 8% of the people related to more public houses, which is not an unexpected response given the closure of The Tower's pub at the shopping centre.

Figure 4.8 Suggestions to improve Ballymun overall



A staggering 85% of people do not visit Ballymun in the evening (see Figure 4.9). Of those who do, shopping, going to the leisure centre and to the theatre constitute the main reasons why.

Figure 4.9 Proportion of people who visit Ballymun in the evenings



4.6 Conclusion

The results of the household shopper survey provide robust empirical evidence of shopping patterns in the Ballymun area. They put technical flesh on the bones of anecdotal observations on the ground. The output of the survey is particularly helpful in quantifying the extent of expenditure leakage from the area. Importantly, the survey findings allow for the incorporation of locally based assumptions for the assessment of future retail floorspace need in Ballymun, which follows in the next section of this Retail Study.

Retail Floorspace Projections

05

Retail Floorspace Projections

5.0 Introduction

This section of the Study details a supply and demand analysis that aims to assess the capacity for additional retail floorspace in Ballymun up to the year 2022. The analysis involves examination of the following factors:

- Population change;
- 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 shopper 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;
- public demand for more shopping provision.

All of this information is extremely useful in substantiating assumptions for the assessment of retail floorspace need in Ballymun.

5.1 Approach to projecting floorspace need

In the interest of sensitivity testing and adopting a flexible approach to statistical forecasting, a range of retail floorspace projections for both convenience goods shopping and comparison goods shopping is required. A range allows for the estimation of a low and high floorspace requirement. Retail analysts often refer to these extremes as indicative of a worst case or pessimistic scenario and a best case or optimistic scenario. As far as Ballymun is concerned the worst case scenario is warranted on the basis of the surveyed low levels of retail expenditure in the area. A best case scenario for Ballymun takes on board the possibility of an improvement in the economy, additional expenditure from workers and students in the area and an increase in population from new housing development. In relation to the latter the Draft Dublin Development Plan 2016-2022 (p10) points to a capacity for another 3,000 residential units in Ballymun.

Having stated the above it is important to note that the high floorspace projections are not intended to function as floorspace caps. Rather, as recognized in the 2012 Retail Planning Guidelines (section 3.6) the floorspace estimates are intended to provide broad guidance on floorspace need and should not serve to inhibit competition.

5.2 Population

For the purpose of retail floorspace projections the catchment of Ballymun is considered to include the 6 electoral divisions (EDs) named as Ballymun A to F**.** Although it is recognised that administrative boundaries do not necessarily correspond with shopper catchments, it is reasonable to contend that Ballymun is entitled to compete for a share of shopping expenditure generated by its own electoral population. In 2011, the population amounted to approximately 20,000 people. A more up to date population recording will soon become available once the 2016 Census is carried out in April 2016.

The latest census results for the years 2006 to 2011 (Table 5.1) indicate that population growth in Ballymun was 0.6% per annum, which was roughly in line with Dublin City Council as a whole (0.8% per annum).

Table 5.1: *Population Change in Ballymun relative to Dublin and the State*

	2006	2011	Annual % Change
Ballymun area[1]	19,517	20,141	0.6%
Dublin City Council	506,211	527,612	0.8%
Dublin[2]	1,187,176	1,273,069	1.4%
State	4,239,848	4,588,252	1,6%

1. *Ballymun Electoral Divisions A-F*
2. *Includes all 4 Councils (Dublin City, Dun Laoghaire-Rathdown, Fingal, South Dublin)*

Closer inspection (Table 5.2) reveals marked differences within the Ballymun area as a result of the area's regeneration and relocation of residents. New housing development at Hampton Wood (off St Margaret's Road) resulted in the highest population increase (75%) in the ED described as Ballymun A between 2006 and 2011. In contrast, demolition in the Sillogue Road area accounted for the biggest decrease in the ED known as Ballymun D (minus 15.9%).

Table 5.2: *Population Change within Ballymun area by Electoral Division*

Electoral Division	2006	2011	% Change 2006 - 2011
Ballymun A	2,101	3,678	75.1%
Ballymun B	3,949	4,012	1.6%
Ballymun C	5,921	5,585	-5.7%
Ballymun D	3,522	2,961	-15.9%
Ballymun E	1,550	1,582	2.1%
Ballymun F	2,474	2,323	-6.1%
Total	**19,517**	**20,141**	**3.2%**

The latest regional population growth forecasts released by the Central Statistics Office (CSO) in December 2013 estimate that population in Dublin will increase by 0.9% per annum between the period 2011 and 2031. For best case forecasting purposes it is assumed that population growth in the Ballymun area will be on par with this average rate for Dublin. The incorporation of a higher rate of growth for the best case analysis takes into account the possibility of appreciable levels of new housing development taking place in the near future. Worst case projections will be based on the slightly lower rate of population growth recently observed at the local level (0.6% per annum).

5.3 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, 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 2014 National Income and Expenditure Report (NIER) produced by the CSO. Inspection of Table 14 of the NIER indicates that in 2014 the average person spent circa €2,759 per year on convenience goods, which equates to €53 per week. Likewise, figures extrapolated from the Retail Strategy for the GDA point to an annual expenditure on convenience goods of €2,463, which equates to €47 per week. This is similar to that figure yielded by the national Household Budget Survey (€47 per week) which was undertaken in 2009-2010.

However, the shopper survey results for Ballymun indicate that the average person in Ballymun has lower disposable income and spends in the region of €1,540 per year on convenience goods. This is equivalent to €30 per head per week and is considerably below the aforementioned NIER and GDA Retail Strategy figures of €53 and €47 respectively.

The variation in the above expenditure findings underlines the necessity to provide a range of floorspace need projections based on the lower Ballymun figure (to arrive at a low floorspace requirement) and the higher national/regional figure (to arrive at a high floorspace requirement). Incorporation of a higher expenditure figure helps to ensure that the contribution of the 700 plus workforce in Ballymun is also recognised in the floorspace need analysis. Having stated this, their impact on available expenditure it quite modest when it is remembered that future floorspace need in Ballymun is calculated on the basis of a catchment population of approximately 20,000 people.

Expenditure on Comparison goods

While the Ballymun shopper survey did retrieve 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 survey in Ballymun. Instead, the level of expenditure in Ballymun for these goods was based on a published regional figure, which was then proportionally reduced in line with the local survey expenditure figure obtained for convenience goods.

In 2007 the Retail Strategy for the GDA estimated the level of comparison goods expenditure per capita in Dublin City at €3,240. When this figure is updated to the year 2016, the base year for projections, by indexing against real growth rates recorded in Table 14.1 of the NIER (circa 0.2% per annum for comparison goods – see table 5.3) the figure slightly increases to €3,299.

In order to establish a local figure for Ballymun the above regional figure is adjusted downwards on a pro rata basis with the lower convenience goods expenditure figure surveyed for Ballymun, which amounted to approximately 60 per cent of the regional average. It was appropriate to use the regional GDA expenditure figure in this case as the NIER did not provide a sufficiently detailed breakdown of expenditure on comparison goods. The application of this reduction rate gives a 2016 comparison goods expenditure figure for Ballymun of €1,979 per head.

Annual growth in expenditure

As referred to above, when projecting the above expenditure per capita figures for the foreseeable future up to the year 2022 it is necessary to consider published growth forecasts.

While the past two years have seen an appreciable improvement in real growth in expenditure on clothes and footwear and household goods, the overall trend in recent times has been one of negligible growth. Inspection of the NIER 2014 indicates that annual real growth in the overall consumption of goods between 2009 and 2014 was 0.2% (Table 5.3).

***Table 5.3**: Annual Percentage Changes in Personal Consumption of goods & services*

Description	2009 - 2014
Food	1.2
Non-alcoholic beverages	7.3
Alcoholic beverages	0.6
Tobacco	-7.1
Clothing and footwear	0
Housing	1.1
Fuel and Power	-1.8
Household equipment and operation	1.7
Transport and communication	-0.4
Recreation, entertainment and education	-0.8
Miscellaneous goods and services	1.8
Expenditure outside the state	-6.5
Expenditure by non-residents	-1.2
Average	**0.2**

Source: Table 14.1 National Income and Expenditure Report 2014

In order to portray a worst case scenario it is assumed that this low level of real growth (0.2%) will continue to apply to expenditure on convenience goods and comparison goods in the foreseeable future.

Best case floorspace projections are based on growth rates predicted by leading retail sources such as Experian and Oxford Economics. They collectively forecast a slightly higher growth in expenditure on convenience goods (0.5% per annum) and an appreciably higher rate of real growth in expenditure on comparison goods (circa 4.0% per annum).

5.4 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, reference to the aforementioned listings, together with figures published by Oxford Economics (Appendix 4) allows for the generation of ‘ballpark’ estimates which satisfy the requirements of this broad assessment. While the Retail Strategy for the GDA estimates turnover ratios achieved by shops at circa €12,000 per net sq m for convenience goods and circa €9,000 per net sq m for comparison goods it was appropriate to reduce these turnover ratios (sales densities) to take into account the reduced level of expenditure that evidently exists in the Ballymun area. Accordingly, respective sales densities of €10,000 per sq m (convenience) and €5,000 per sq m (comparison) have been adopted for forecasting purposes. These are largely based on minimum turnover estimates contained in other retail strategies.

5.5 Impact from internet shopping

In theory the growth of online shopping would imply that the need for development of retail floorspace on the ground should decline at a concomitant rate. However, latest research from Britain indicates that there are two reasons why retail floorspace will continue to be built in the foreseeable future.

- Firstly, Oxford Economics predict that the majority of shopping for the next ten years will continue to take place in shops (Appendix 4). This includes over 90 per cent of food shopping and 75 per cent of comparison goods shopping.
- Secondly, most online shopping for convenience goods will still involve deliveries from existing retail stores as opposed to direct despatch from distribution warehouses. However, it must be acknowledged that an increasing proportion of online comparison goods shopping will be sourced directly from the warehouse.

In the light of the above information it is reasonable to assume, certainly for the duration of the Ballymun Local Area Plan, that the majority of retail sales will continue to be sourced from shops.

5.6 Shopping patterns

The Ballymun surveys yielded invaluable information on shopping patterns which could then be translated into integral assumptions for floorspace projections in this assessment.

The most significant finding to emerge from the household shopper survey was the huge level of consumer leakage from Ballymun to competing centres in neighbouring areas. As outlined in Section 4.0, this amounted to 75 per cent of expenditure on convenience goods and at least 90 per cent of expenditure on comparison goods.

The survey also indicated that half of the people in Ballymun expressed a desire for new shops and this finding highlighted the potential to claw back some of this expenditure leakage.

5.7 Assessment of retail floorspace need

Taking into account the above considerations it is possible to estimate the capacity of Ballymun to accommodate new retail development over the period 2016-2022 for both convenience goods and comparison goods.

As explained previously, a range of floorspace need is estimated based on a worst case scenario (based on low and pessimistic predictions) and a best case scenario (based on high and optimistic predictions).

(i) Convenience Goods

Low floorspace requirement

The following assumptions are made for a worst case assessment:

- Population growth in Ballymun will be in keeping with previous years, namely 0.6% per annum.
- The expenditure per capita figure in 2016 will amount to €1,540. This is derived from the survey finding of €80 per week per household spent on convenience goods (i.e. €4,160 annually) and then divided by the average household size of 2.7.
- Real growth in expenditure on convenience goods will be marginal (0.2% per annum as per the recent general trend observed in the NIER-see section 5.3 above) to give a per capita expenditure figure of €1,559 in 2022.
- The leakage of expenditure on convenience goods from the Ballymun area is 75%.
- Half of this leakage can be recovered via the introduction of new retail floorspace to Ballymun. This is based on the survey finding that approximately half the respondents expressed a desire for more shopping facilities (see section 4.5).
- The annual turnover of new convenience goods floorspace will approximate to €10,000 per net sq.m.

Based upon the above considerations it is shown in Table 5.4 that at least **1,258 net sq m (13,500 net sq ft)** of new convenience goods floorspace can be developed in Ballymun by the year 2022.

Table 5.4: *Low floorspace requirement for Convenience Goods in Ballymun ~ 2016-2022*

		2016	2022
A	Population	20,753	21,511
B	Expenditure per capita	€1,540.74	€1,559.32
C = A x B	Total expenditure in Ballymun area	€31,974,260	€33,542,445
D = C x 0.75	Expenditure leakage from Ballymun area estimated at 75% from survey*	€23,980,695	€25,156,834
E = D x 0.5	Clawback of expenditure leakage by Ballymun estimated at half #	€11,990,347	€12,578,417
F = E/10000	Estimated floorspace need (net sqm) based on turnover of €10,000 psm	1,199	1,258

~ inclusive of Ballymun DEDs A-F

**This is over three times the average*

 # approximates to proportion of surveyed people who wanted more shopping

Please allow for minor numerical discrepancies due to computerised calculations.

Table 5.5: *High floorspace requirement for Convenience Goods in Ballymun ~ 2016-2022*

		2016	2022
A	Population	21,064	22,227
B	Expenditure per capita	€2,463.13	€2,537.96
C = A x B	Total expenditure in Ballymun area	€51,882,997	€56,411,600
D = C x 0.75	Expenditure leakage from Ballymun area estimated at 75% from survey*	€38,912,247	€42,308,700
E = D x 0.5	Clawback of expenditure leakage by Ballymun estimated at half #	€19,456,124	€21,154,350
F = E/10000	Estimated floorspace need (net sqm) based on turnover of €10,000 psm	1,946	2,115

~ inclusive of Ballymun DEDs A-F

**This is over three times the average*

 # approximates to proportion of surveyed people who wanted more shopping

Please allow for minor numerical discrepancies due to computerised calculations.

High floorspace requirement

When the above exercise is reworked in Table 5.5 on the basis of a higher regional GDA expenditure figure (€2,463 per capita in 2016), a slightly higher real growth in expenditure of 0.5% per annum to give a per capita expenditure figure of €2,537 in 2022 and regional population projections for the GDA (0.9% per annum), instead of local findings for Ballymun, the floorspace capacity for convenience goods increases to **2,115 net sq m (22,700 net sq ft).**

Overall, therefore, it is estimated that there is capacity to add between **1,258 and 2,115 net sq m** of convenience goods floorspace to Ballymun during the period of the LAP.

(ii) Comparison goods

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

Low floorspace requirement

The following assumptions are made in the assessment:

- Population growth in Ballymun will be in keeping with previous years, namely 0.6% per annum.
- The expenditure per capita figure in 2016 will amount to €1,979. This amounts to 60% of the GDA figure of €3,299. The reduction is intended to reflect the lower income profile of the Ballymun area and is indexed to the local survey finding on expenditure for convenience goods.

- Real growth in expenditure on comparison goods will be marginal (0.2% per annum as per the recent general trend observed in the NIER-see section 5.3 above) to give a per capita expenditure figure of €2,003 in 2022.
- The leakage of expenditure on comparison goods from Ballymun is 90%.
- A fifth of this leakage can be clawed back via the introduction of new retail floorspace. This estimate is based on the realistic assumption that recovery of expenditure on comparison goods will be more modest and below that for convenience goods, given the attraction of Dublin City Centre and other large retail centres for this type of shopping.
- The turnover of new comparison goods floorspace will approximate to €5,000 per net sq.m.

Based upon the above considerations it is shown in Table 5.6 that at least **1,551 net sq m (16,600 net sq ft)** of new comparison goods floorspace can be developed in Ballymun over the next six years.

High floorspace requirement

When the above exercise is repeated on the basis of regional GDA expenditure figures (€3,299 per capita in 2016), a real growth rate in expenditure of 4% per annum to give a per capita expenditure figure of €4,174 in 2022 and population projections for the GDA (0.9% per annum), as opposed to local findings for Ballymun, the capacity increases to **3,340 net sq m (35,000 net sq ft**).

Therefore, it is estimated that there is capacity to build between **1,551 and 3,340 net sq m** of comparison goods floorspace in Ballymun by the year 2022.

Table 5.6: *Low floorspace requirement for Comparison Goods in Ballymun ~ 2016-2022*

		2016	2022
A	Population	20,753	21,511
B	Expenditure per capita	€1,979.40	€2,003.27
C = A x B	Total expenditure in Ballymun area	€41,077,547	€43,092,205
D = C x 0.9	Expenditure leakage from Ballymun area estimated at 90% from survey*	€36,969,792	€38,782,984
E = D x 0.2	Clawback of expenditure leakage by Ballymun estimated at a fifth	€7,393,958	€7,756,597
F = E/5000	Estimated floorspace need (net sqm) based on turnover of €5,000 psm	1,479	1,551

~ inclusive of Ballymun DEDs A-F

**This is not an unusual level of leakage compared to other District Centres*

Please allow for minor numerical discrepancies due to computerised calculations.

Table 5.7: *High floorspace requirement for Comparison Goods in Ballymun ~ 2016-2022*

		2016	2022
A	Population	21,064	22,227
B	Expenditure per capita	€3,299.81	€4,174.04
C = A x B	Total expenditure in Ballymun area	€69,485,406	€92,777,066
D = C x 0.9	Expenditure leakage from Ballymun area estimated at 90% from survey*	€62,536,865	€83,499,359
E = D x 0.2	Clawback of expenditure leakage by Ballymun estimated at a fifth	€12,507,373	€16,699,872
F = E/5000	Estimated floorspace need (net sqm) based on turnover of €5,000 psm	2,501	3,340

~ inclusive of Ballymun DEDs A-F

**This is not an unusual level of leakage compared to other District Centres*

Please allow for minor numerical discrepancies due to computerised calculations.

5.8 Conclusion

The raw data from the up to date household shopper survey has enabled the estimation of the future capacity for additional retail development in Ballymun on the basis of reliable information. In particular, proper account has been taken of two significant characteristics of shopping in the Ballymun area. Firstly, expenditure levels are considerably lower than the national and regional average. Secondly, shopper expenditure is leaking from the area at an abnormal rate, especially in respect of convenience goods shopping. Recognition of these shopping patterns has allowed for a practical assessment of the capacity for additional retail development in Ballymun.

Ballymun - Comparative Analysis with other District Centres

06

Ballymun - Comparative Analysis with other District Centres

6.1 Introduction

This section undertakes an overarching appraisal of the strengths and weaknesses of Ballymun so that the study is better able to recognise the possibilities and limitations for retailing in the area. Equipped with this knowledge it is also possible to examine if any lessons can be learnt from the experience of District Centres elsewhere.

6.1 SWOC assessment

The strengths, weaknesses, opportunities and constraints (SWOC) that pertain to Ballymun are tabulated and expanded upon below. These findings were elicited from the consultation process, particularly the meeting with the Ballymun 4 Business (B4B) group as well as research and analysis on the ground. Appendix 5a contains a report of the consultation exercise.

Strengths

Ballymun is a well-established residential community situated next to the M50. The R108 regional road that serves as the functional spine for Ballymun, in terms of conferring it a Main Street, also acts as the conduit to and from the M50 for 12,000 vehicles each day.

Against this background of excellent accessibility, Ballymun possesses a strong civic and community base upon which to expand its retail base. To this end it is assisted by the seasonal spend of students frequenting Dublin City University, accommodation for whom is located nearby, and by the tourist and cultural draw of its two hotels and theatre.

Weaknesses

As far as retailing is concerned the greatest handicap of the area is its weak purchasing power. According to official statistics approximately 4 in every 10 households in Ballymun electoral divisions (EDs) labelled A-F consist of lone parents. Added to this the unemployment rate is 50 per cent higher than the national average. Indeed, in the 2011 census, the Ballymun EDs featured prominently as unemployment blackspots.

Opportunities

There is a significant amount of land in the ownership of Dublin City Council, including the former shopping centre. Bearing in mind that land assembly/acquisition is one of the most problematic issues affecting the delivery of new shopping development the public ownership of key development land affords a significant opportunity for Ballymun to attract retail investment.

There are approximately 34 hectares of undeveloped land available for mixed use commercial and residential development within the Ballymun LAP (including the mixed use shopping centre site) and an additional c.27ha within the adjoining M50 lands. Even allowing for a reduced shopper spend in the area the potential introduction of additional consumers from residential development would clearly have positive implications for retail floorspace need in Ballymun. At the very least it points to the need for this Study to incorporate a best case appraisal of floorspace need.

In the long term, retail development opportunities in Ballymun may emerge from the development of the Metro North proposal, and the creation of a stop at Ballymun in 10 years' time. A 2015 survey by the National Transport Authority indicated that over half of total retail spend in Dublin City Centre comes from shoppers who arrive by public transport. This finding points to the importance of a reliable public transport system and the contribution that Metro North could make to shopping in Ballymun.

Constraints

The Council area of Fingal extends beyond the M50 and into areas bordering Ballymun. As evidenced by the opening of the Charlestown Shopping Centre, IKEA and Gulliver's Retail Park over the past 10 years Fingal County Council did not stand still while Ballymun underwent regeneration. The inability to effectively control competing retail development in neighbouring Council areas poses a significant constraint to the shopping prospects for Ballymun. The aforementioned retail developments, together with the opening of discount stores in surrounding areas, have significantly eroded the retail market share of Ballymun. If the Ballymun Shopping Centre site is not redeveloped in the short to medium term there could be a negative impact and consequent effect on the wider regeneration of the area.

Table 6.1: *Ballymun SWOC Assessment*

Strengths
High accessibility (M50 & road infrastructure)
High level of passing traffic
Significant amount of civic investment
Proximity to Dublin Airport (tourist capture by hotels)
Proximity to DCU (student trade)
A strong sense of community and loyalty to local shops & services
Weaknesses
Low disposable incomes
Divisive "Freeway" effect of R108
Lack of a focal point
Stigma/perception of locality
Grey/bland appearance of area
Opportunities
Large amount of development land in Council ownership
Potential for significant residential expansion
Metro North proposal
Constraints
Location at County Council interface
Loss of market share to competing centres
Lack of market appeal
Negative perceptions of statutory bodies and agencies

6.2 Comparative analysis - Key retail messages

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 Spitall), Manchester (Chorlton) and London (Haringey and Park Royal) cast light on a common approach to planning for retailing in 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 retail regeneration in these locations.

Firstly, it is recognised that the promotion of retailing comprises only one strand of a multifaceted approach to the regeneration of a District Centre.
Secondly, planning for retail development is allied to public realm enhancements and improved management of the area.

A number of consistent messages can be distilled from experience elsewhere, the majority of which are relevant to Ballymun. These include the following:

- **Emphasis is on retaining expenditure on convenience goods within the District Centre catchment.**

  District Centres principally rely on strengthening their convenience goods shopping as a means of bolstering retail trade in general.

- **It is not unusual for most expenditure on comparison goods to seep to large centres elsewhere.**

  Other District Centres recorded expenditure leakage as high as 95 per cent in respect of shopping for comparison goods. In this regard, the high level of expenditure leakage from Ballymun for these goods is not unusual and should not give undue cause for concern.

- **Focus is on promoting the retail distinctiveness of the area.**

  Some of the District Centres possess a strong independent, non-food retail sector that could be built upon. Unfortunately, no such retail sector exists in Ballymun and it is highly questionable whether one could be artificially introduced. Instead, through the development of its Rediscovery Centre and Axis Theatre the distinctiveness of Ballymun is more closely aligned to its cultivation as an Eco and Arts Destination.

  The distinctiveness of Ballymun also relates to its transformation from a high density public sector housing project in the 1960s to a suburban community that commands high accessibility to Dublin City Centre, the M50 and Dublin Airport. In many respects the verticality of the demolished tower blocks has been replaced with the imposing scale and massing of civic and mixed use buildings. It is the commanding presence of these buildings, together with the huge level of public investment and strong sense of identity in the area, which also helps set Ballymun apart from other District Centres.

- **Attention is placed on:**
  - Environmental improvements & public realm enhancements;
  - Cleanliness & greening of area;
  - Increased security, including improved lighting and policing.

All of the above considerations are pertinent to Ballymun. The maintenance of a safe, clean environment generates a feel-good factor and encourages people to shop at home.

6.3 Consultation

In addition to the survey of the shopping public in Ballymun a range of bodies and individuals were consulted during the preparation of the Retail Study. This included the North West Area Committee, the Civic Alliance, the Ballymun for Business (B4B) group and key stakeholders in the retail and business sectors. The latter sectors included the managers of the main shopping centres in the area, the Axis Theatre and commercial agents. Overall, the input from this invaluable consultation process ensured that the objective output of this Study was mindful of the community's development aspirations for Ballymun, as well as the business realities on the ground. Appendix 5a contains full details of each consultation.

6.4 Conclusion

The benefit of carrying out the above SWOC analysis relates to its assistance in helping to practically evaluate what can and cannot be achieved under the retail study for Ballymun. In assessing the scope for retail development regard therefore needs to be given to the socio-economic reality on the ground, the competition posed by other retail centres nearby, and the experience of other District Centres.

Experience in District Centres elsewhere indicates that Ballymun is not alone in hemorrhaging non-food trade to competing centres. It also indicates that retail regeneration not only consists of retail development but of related improvements in the public realm and District Centre management.

PART C: Strategic Guidance

07

Strategic Guidance – the Way Forward

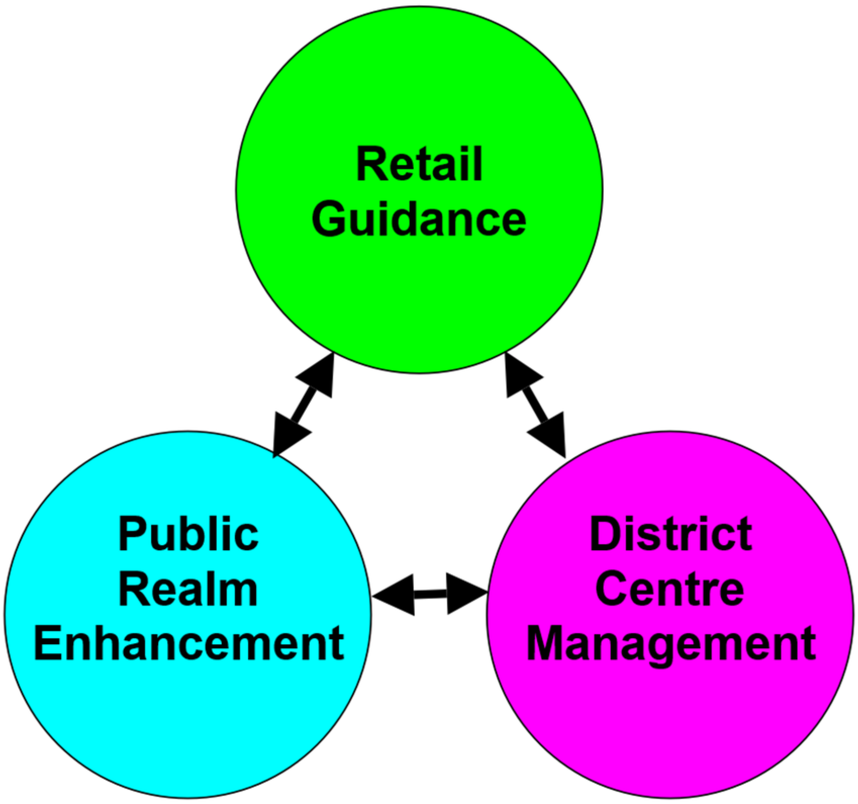
7.0 Introduction

Taking on board all the foregoing research and analysis, together with the output of the consultation process, this section of the study mainly provides **strategic guidance** and corresponding **SMART objectives** on:

- the scale, nature and location of retailing in Ballymun for both the convenience goods and comparison goods sectors;
- related public realm enhancements; and
- district centre management.

The purpose of this guidance is not to rigidly prescribe all the detailed measures and works considered necessary to improve retailing in the Ballymun area. Rather, its primary aim is to outline the general scope and type of improvements that could be considered for incorporation into the Local Area Plan. These are subsumed under the three key components of the Retail Study, as presented in Figure 7.1, each of which is addressed in Sections 7.1, 7.2 and 7.3 respectively.

Fig 7.1 Key Components of Retail Study



7.1 Retail guidance

Equipped with the interrelated output of the household shopper survey, the consultation process, floorspace need projections and comparative analysis with other District Centres, the retail study for Ballymun is able to advise on how much retail floorspace could be developed and where and when development should take place. As stated above, this strategic guidance is provided separately for both the convenience goods and comparison goods sectors.

(i) Convenience goods

Scale & nature

At a minimum, Table 7.1 indicates that Ballymun is capable of accommodating 1,258 net sq m of new convenience goods floorspace up to the year 2022. This amount of sales space is equivalent in size to a supermarket. A more optimistic forecast based on regional figures would suggest a higher capacity for nearly twice this amount of floorspace, approximating to 2,115 net sq m.

Table 7.1: Retail Floorspace Projections for Ballymun 2022

Floorspace Category		Net sq.m.	Net sq.ft.
Convenience Goods	Low	1,258	13,541
	High	2,115	22,766

Cognisant of the size of competing units in the surrounding area it is recommended that this new retail floorspace be developed as large units as opposed to a number of small units. In so doing, it will allow Ballymun to compete on a like-for-like basis with similar foodstores in neighbouring areas.

Expanding the level of grocery provision in Ballymun in this way can be considered beneficial in two 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 Ballymun for regular food shopping can only augur well for the trade of other businesses.

Fig 7.2 Example of convenience goods shopping

Location

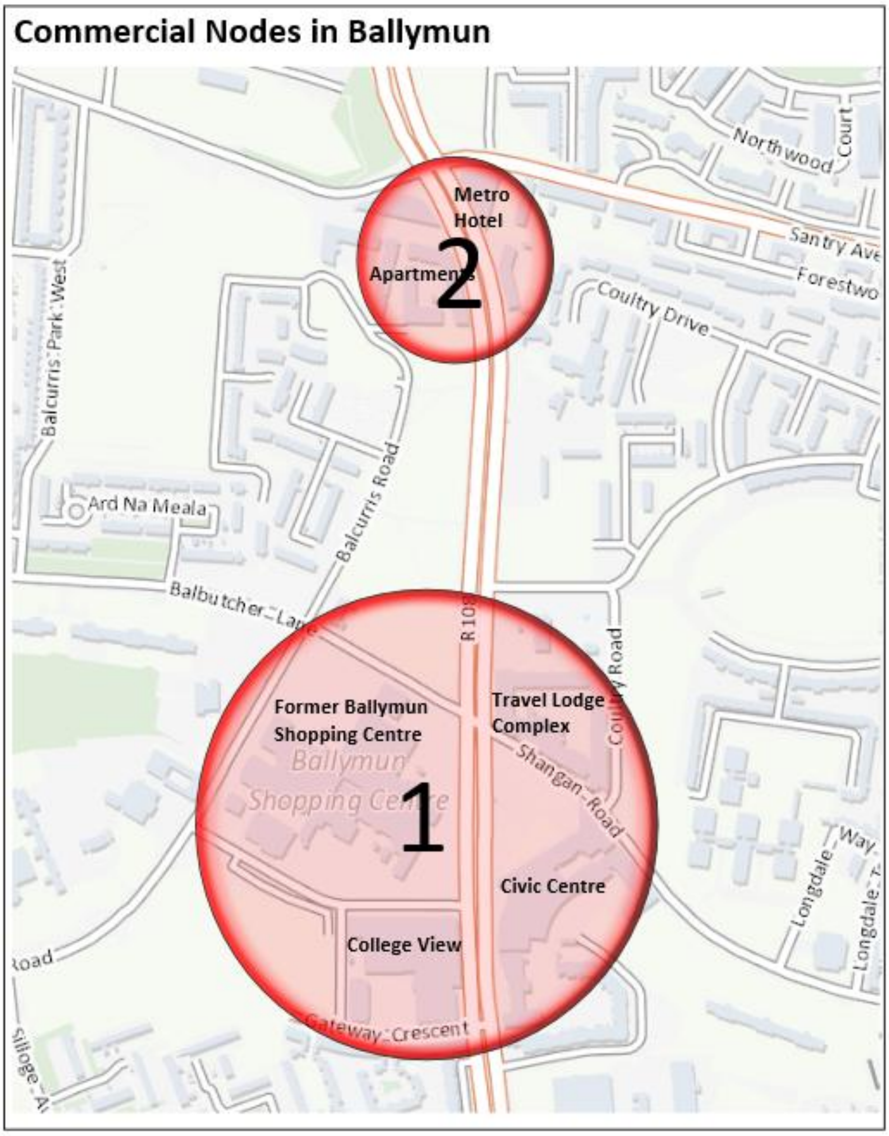
Foodstore development should generally take place on land zoned for Z4 mixed use in Ballymun. However, in order to best advise where future retail development should specifically take place it is necessary to appreciate the existing retail and commercial landscape in Ballymun.

As outlined in Section 2.0 there are essentially two nodes of commercial investment in Ballymun, both of which are clustered around the intersection of the road network.

The largest node (Figure 7.3) extends from the intersection of the Shangan Road and Balbutcher Lane Lower to Gateway Crescent. It consists of four mixed use buildings including: the Travel Lodge complex, Civic Centre, College View and the former Shopping Centre. Retail use in the form of Supervalu, Centra and pharmacies occupies a number of the ground floor units at College View, the Civic Centre and Travel Lodge complex.

The second commercial node is located on the southern side of Santry Avenue and forms part of mainly high rise residential development (known as Santry Cross) and the Metro Hotel. Compared to the large commercial node in Ballymun it accommodates limited retail use and the 2007 Ballymun Masterplan map recognises it as being equally attractive for office use.

Figure 7.3 Commercial Nodes in Ballymun



Having regard to this existing pattern of development, major convenience goods development should be first directed to the large commercial node. Development here would heighten the potential for synergy with existing retail businesses. The appropriateness of developing Z4 land for foodstore development should be assessed on the basis of sequential test criteria relating to suitability, availability and viability of land and property beyond this commercial node.

Ideally, if the land was readily available for development, the tenets of proper planning and sustainable development would dictate that the former shopping centre should be the preferred site for retail development. Comprising over 5 hectares of land, which includes land behind Supervalu, it constitutes the largest tract of Z4 serviced land available for retail development and therefore affords the greatest versatility in the layout options that can be considered. However, the requirement to undergo a compulsory purchase process to fully assemble this site means that it may not become available in the immediate future. Accordingly, given the pressing need to bolster retailing in Ballymun, as highlighted in the household survey, other development options within this Commercial

Node may need to be explored. Indeed, at the time of preparing this Study, the adjacent site north of the former shopping centre is currently in receipt of an expression of interest to provide a retail-led mixed use scheme. Its development, as well the redevelopment of the former shopping centre site, will all have to dovetail into wider public realm proposals envisaged for this Commercial Node (see Section 7.2 later).

(ii) Comparison goods

Scale and nature

The analysis of future shopping need (Table 7.2) anticipates that Ballymun is capable of accommodating at least 1,551 net sq m. of new comparison goods floorspace by the year 2022. A more optimistic projection sees this capacity double to 3,340 net sq m.

Table 7.2: Retail Floorspace Projections for Ballymun 2022

Floorspace Category		Net sq.m.	Net sq.ft.
Comparison Goods	Low	1,551	16,694
	High	3,340	35,951

Even though the translation of comparison goods floorspace figures into unit numbers is subject to the vagaries of end-user requirements, it is useful, as a frame of reference, to note that the low floorspace figure is equivalent in size to several retail warehouse units at Gulliver's Retail Park or approximately a dozen Main Street units.

It is important to note that this comparison goods floorspace forecast is inclusive of bulky goods floorspace, which typically applies to larger units. Bulky goods retailers require bigger operational and showroom space for the large ticket items they sell. They usually trade from retail warehouses. Their floorspace requirements therefore highlight the appropriateness of providing a high floorspace need figure in this retail study.

While the assessment of future convenience goods floorspace demonstrates a capacity for another supermarket it is less clear what specific uses can be prescribed for comparison goods shopping. The results of the household shopper survey indicated the appeal of an electrical retailer in Finglas and this may represent one opportunity for a store opening in Ballymun. In an attempt to identify further uses reference can be made to what worked before in the former Ballymun Shopping Centre, as well as from observation of tenant profiles in other shopping centres and from discussions with commercial agents. In relation to the former Ballymun Shopping Centre a menswear and shoe shop apparently fared well. Other shopping centre managers indicated that discount retailers such as Dealz are best suited to Ballymun because of its low purchasing power. Commercial agents also supported this viewpoint. Indeed, 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.

It is difficult to make a case for the cultivation of specialist comparison goods shops in Ballymun given the absence of a track record of niche retailing activity at this location. Ultimately it will be the market that will decide the type of comparison goods retailers that will be attracted to Ballymun. To this end, the Retail Study has provided guidance in quantifying how much comparison goods retail space can be accommodated and in highlighting that a mix of unit sizes can be considered.

Location

New comparison goods floorspace should be developed within the large commercial node. In so doing, it would allow for the creation of a critical mass of shopping in Ballymun. It is anticipated that opportunities for large unit build will be linked to the eventual redevelopment of the former shopping centre site.

As for existing retail space, the accommodation of non-bulky comparison goods retailers in the vacant units fronting the Main Street should also continue to be facilitated. Emphasis should be placed on first securing occupation of those vacant units that front the Main Street rather than those occupying offstreet locations. It is acknowledged that the six vacant units to the rear of the Plaza Building on Coultry Road have been challenging to let. They were originally intended to function as live/work units. The best hope for their occupation related to the accommodation of relocated tenants from the shopping centre. However, this process is effectively complete and still these units remain vacant. All land use options for their occupation needs to be considered.

Phasing & employment

The twin impacts of the Ballymun shopping centre becoming obsolete and the development of competing retail stores in surrounding areas means that the facilitation of modern retail floorspace in Ballymun should be a priority. In this regard, phasing of the retail component parts is not required.

Prioritizing the development of new retail space will confer direct economic benefits vis-à-vis increased rates and employment. Experience has demonstrated that employment generation typically approximates to the creation of one retail post per 20-25 gross sq.m. of non-discount foodstore floorspace, one per 75-80 gross sq.m. of discount foodstore floorspace and one per 40 gross sq.m. of non-food retail floorspace built. In terms of estimating the employment multiplier effect of new retail development research largely relates to foodstore construction of 2,500 net sq.m. or more. It suggests that the spin-off employment rate could range between 1.3 and 2.0, in terms of the number of full time and part time jobs created indirectly in related sectors within two to three years of a new store opening.

SMART objectives relating to retailing

In the light of the above considerations a number of interrelated SMART objectives can be distilled for retail planning in Ballymun. These are listed in Table 7.3, together with the key findings that they are intended to address.

Table 7.3 Key findings and recommendations of Retail Study 2015 - Retailing

Retailing	
Key Findings	**Recommendations**
Low disposable income in area but potential to improve	Accommodate a range of additional retail floorspace
High expenditure leakage from Ballymun area	Encourage opening of another foodstore in Ballymun's zoned Z4 lands to help claw back expenditure leakage.
Public demand for more retail space	Facilitate opening of comparison goods shops, including bulky goods units, in association with foodstore development
Need to develop critical mass of retailing	Adopt the sequential approach to the assessment of large retail proposals by appraising the suitability, availability and viability of first developing land for retail use within and around the largest commercial node in Ballymun.
Maximise prominence of new retail development	Ensure that any large retail development affords good roadside commercial visibility and integrates with existing businesses in Ballymun, in terms of establishing good vehicular and pedestrian linkages.
Lack of Developer appeal for New Shopping Centre	Develop new retail units in a non-mall format with own-door shopfronts that are free from the operational, leasing and servicing commitments of a shopping centre.
Market for vacant units is very poor	Retain maximum flexibility in the uses considered permissible in vacant units and prioritize the occupation of those empty units on Main Street that front the R108 regional road.
Desire for more café/ restaurant space	Promote opening of complementary uses in the form of a coffee shop and/or family-friendly restaurant in any proposed retail development and/or elsewhere on Main Street.

7.2 Public realm enhancement

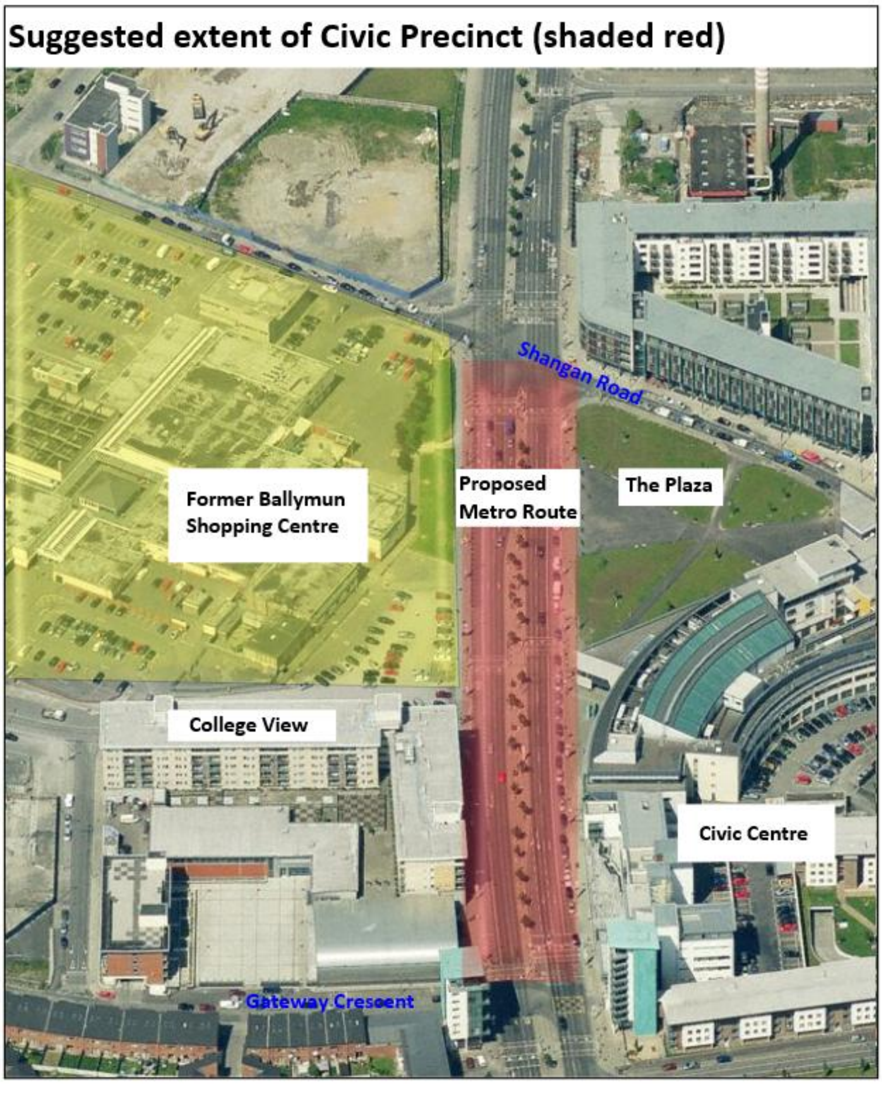
Linked with the need for the facilitation of new retail floorspace is the requirement to investigate opportunities for environmental improvements in the area. This is in part a response to the consultation feedback which criticized (despite the laudable work of the Tidy Towns organisation) the grey, bland environment of Ballymun. It is also in recognition of one of the key strands of District Centre planning, which is to physically enhance, manage and promote the District Centre as a place to live, visit and do business.

Environmental improvement can help reinforce a district centre's distinctiveness and sense of place, and thereby help restore confidence in its commercial offer. This has been successfully carried out by Aecom in other locations, including Downpatrick and Newcastle (see Figures 7.6 and 7.7 later). Environmental improvement is particularly warranted in the case of Ballymun given the demise of the shopping centre and the significant transformation in its built environment in recent times. With this in mind, it is submitted that the cornerstone of public realm enhancement in this Key District Centre should relate to the creation of a focal point for Ballymun.

Focal Point

At present, the main road through the District Centre is akin to a freeway that inhibits interaction between each side of the street. The poor connectivity is exacerbated by the existence of large open tracts of land without a street frontage. There is a need to create a focal point in Ballymun which instills a sense of place and arrival for visitors and encourages pedestrian movement from one side of the road to the other. This could take shape in the form of a Civic Precinct (Figure 7.4).

Figure 7.4



Logic would dictate that the 270m stretch of road between Shangan Road and Gateway Crescent constitutes the heart of Ballymun. It is home to the former shopping centre, Ballymun's largest foodstore (Supervalu) and the Civic Centre, with its plaza area to the front. The Civic Centre is the civic, cultural and economic hub of the area. This status is reaffirmed by its ongoing occupation by de-tenanted businesses and services from the dilapidated shopping centre, together with its accommodation of the area's main cultural offering, the AXIS theatre.

Fig 7.5 Ballymun Plaza in front of Civic Centre (Axis Theatre)

The designation of a civic precinct here would enable this stretch of Ballymun Main Street to become the focus of pedestrian friendly initiatives. Its designation for environmental improvement is intended to slow traffic down, alert people to off-street parking opportunities and ultimately encourage people to stop and shop. Subject to a detailed evaluation of the works and costs involved improvements could include the following:

- Demarcating the civic precinct through use of ornate lighting columns, public art, footway build outs;
- Developing a high quality public realm floorscape with hard and soft landscaping;
- Raising this stretch of carriageway and/or changing its road surface material.

Importantly, the proposed civic precinct would have to integrate with a number of other proposals and aspirations for this area, including:

- Metro North proposals for the erection of an above ground metro stop, which may be built within or adjoining this precinct;
- Aspirations to improve the usage of the spacious Plaza area in front of the Axis Theatre (Figure 7.5); and
- Medium to long term ambitions to redevelop the former shopping centre site to include a related quality built environment.

Fig 7.6 Aecom's Public Realm work in Downpatrick

Fig 7.7 Aecom's public realm work in Newcastle, Co Down

Signage

While Ballymun benefits from high accessibility and visibility from the M50 it is less clear to a visitor where the heart of this District Centre lies – hence the need to establish a focal point. Reference to the land use map in the Development Plan indicates that it stretches from Santry Avenue to the Leisure Centre at Gateway Crescent, which is a distance of over 750m. There is a need to signal to the visitor that the centre of Ballymun has been reached. With this in mind, and taking on board the aspiration to develop a focal point in Ballymun, the erection of a sizeable "Welcome to Ballymun" freestanding sign should be erected at the northern end of the proposed civic precinct. A comparable sign could also be considered for installation at the other end of the proposed precinct in front of the leisure centre.

So too, once the visitor has exited the M50 interchange there is an 800m length of roadway to be travelled before reaching Santry Cross. Along this stretch of road there is a need to alert the visitor to the presence of Ballymun and other retail venues in the area, namely IKEA and Gulliver's Retail Park. With this in mind, there is scope to erect one large shared sign, in advance of the traffic lights at IKEA, highlighting the presence of these locations. AECOM's survey of IKEA users indicated an extensive catchment (see Appendix 1) and improved signage of this type could assist in attracting some of these visitors into Ballymun.

Phasing of environmental works

It is considered that the environmental works associated with the proposed civic precinct in this retail study are not time dependent on first securing redevelopment of the former shopping centre site. This is because approximately 100m of the designation applies to a length of carriageway that is already developed on each side, i.e. from Supervalu to the Leisure Centre, and this could constitute phase 1 of the works.

It is envisaged that the environmental works on the site of the former shopping centre will form part and parcel of the redevelopment of the site. Ideally these should be provided by the private sector via planning conditions and contractual agreements with the Council related to a planning permission. However, in the absence of this happening, publicly funded interim landscaping measures may also have to be considered, possibly in conjunction with proposals to maximise the functionality of the Plaza space.

In addition, despite the lack of precise details on the location of the proposed Metro Stop in Ballymun, it is assumed that the proposed environmental works for the proposed Civic Precinct can take place without prejudice to the installation of the Stop. It is nonetheless recognised that the scope and nature of the environmental works may have to be modified to accord with the exact location of the Metro Stop.

SMART objectives relating to public realm enhancement

As in the case of retailing, a number of objectives for the public realm in Ballymun can be proposed in response to the key findings of the Study. These are outlined in Table 7.4.

Table 7.4: Key findings and recommendations of Retail Study 2015 – Public Realm

Public Realm Enhancement	
Key Findings	**Recommendations**
Need for a focal point	Designate the area on Main Street between Shangan Road & Gateway Crescent as a Civic Precinct, which would act as a focal point for Ballymun. Create a distinctive sense of place and identity at the Civic Precinct via streetscape enhancements (e.g. paving, lighting, public art)
	As a complement to the above proposal create a quality built environment on the site of the former shopping centre, capable of instilling a sense of arrival and encouraging people to stop and shop.
Scope to improve signage	Introduce "Welcome to Ballymun" signage in the proposed Civic Precinct
	In conjunction with Fingal County Council introduce one large shared sign between M50 Interchange & Santry Crossroads highlighting the presence of IKEA, Ballymun and Gulliver's Retail Park.
Address negative appearance of the area	Resources permitting, install virtual shopfronts on vacant roadside premises on the Main Street as an interim counterweight to their negative visual impact.

7.3 District Centre Management

Management of this District Centre already benefits from the decentralized presence of Dublin City Council offices in the Civic Centre. It is perfectly placed to assist in the employment of “soft measures” for the advancement of retailing in Ballymun. This may relate to incentives, initiatives and marketing strategies.

Incentives

DCC already offers short term leasing agreements and start-up concessionary rates to assist in the occupation of vacant units in Z4 zoned lands in Ballymun District Centre. Discussions with the other shopping centre managers reveal that maximum flexibility in terms is applied to secure the occupation of vacant units. Rent free periods are offered by shopping centres and these extend from 1 month to 5 years depending on the requirements of the tenant. In recent times, leasehold agreements involving capped rents plus a proportion of the turnover have become popular with fashion and food retailers. This involves a payment of a base rent, with a percentage of turnover added once a certain threshold is exceeded. In order for the latter arrangement to work annual accounts have to be submitted by the lessee for verification. In theory, the adoption of turnover based leasehold agreements could be considered by the Council as a means of attracting tenants to the vacant units. However, in practice, it is labour intensive work and the resources are not available at this time to countenance such an option. This notwithstanding further consideration should be given to the range of rental incentives offered by the Council.

Initiatives

A farmer's market successfully operated in Ballymun Shopping Centre in recent times and, assuming a suitable venue can be provided, presumably it can do so again. Other District Centres typically reserve a portion of a large car park on a selected day of the week for market use. The largest off-street car park in Ballymun is the one linked to the former shopping centre. Accordingly, it is suggested that consideration should be given to the incorporation of a weekly farmer's market into any redevelopment proposals for the former shopping centre site.

Marketing

Ballymun is quite unique in having two hotels as part of its mixed use profile. Accordingly, in order to generate footfall levels in Ballymun, opportunities for joint promotional strategies should be thoroughly investigated to persuade people to undertake short stay package trips in the area linked to various events (e.g. Halloween fireworks display) and arts and music festivals. With this in mind, the Axis Theatre, which includes dance studios and music and recording studios, has a wide appeal as well as being an outlet for local talent.

The prospects for fostering joint marketing initiatives aimed at tapping into the GDA numbers frequenting IKEA would appear slim. IKEA is a self-reliant, distinctive brand, whose store in Ballymun commands a position of high visibility off the M50. Its promotional initiatives choose to centre on charity and recycling work, as opposed to cooperation with other retailers.

In terms of marketing it is noteworthy that the draft Ballymun Economic Plan 2015 intends to create a website to support local businesses, as per one of its strategic goals to establish the physical support infrastructure in the area. As part of its development this Retail Study recommends that a separate webpage within this website be dedicated to highlighting the retail development opportunities in Ballymun, This would build upon the findings of this study and focus on the attractions for retail investment. These include: the immediate availability of publicly assembled land for development, the available catchment expenditure, the high accessibility of the area, the surveyed desire for more shopping space, the local presence of Council offices to provide assistance, etc.

SMART objectives relating to District Centre Management

Having regard to the foregoing a number of objectives can be formulated for the management of the District Centre. These are outlined in Table 7.5.

Table 7.5: Key findings and recommendations of Retail Study 2015 – District Centre Management

District Centre Management	
Key Findings	**Recommendations**
Shopping Centres employ a range of rental options to secure occupancy of vacant units	Further investigate the range of rental options for the occupation of vacant units in Ballymun
Farmer's market in Ballymun was a success before	Consider the feasibility of incorporating a weekly farmer's market into any redevelopment proposals for the former shopping centre site.
Need to maximize joint potential of hotel & civic space in attracting people into the area	Explore in detail opportunities for joint promotional strategies to encourage people to undertake short stay package trips in the area linked to various events.
Requirement to highlight retail opportunities in Ballymun	Create webpage as part of website earmarked for local businesses

7.4 Planning & development considerations

Retail challenges & outlook

Discussions with shopping centre managers indicated that 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 growth in online shopping. As outlined in Section 5.5 of the Retail Study internet shopping is forecast to continue to grow in the coming years. Nonetheless, for the foreseeable future, the majority of retail sales are still expected to take place from shops.

Land use flexibility

The Z4 zoning of District Centre lands effectively confers town centre status on this location, wherein a wide range of uses can be considered for development. The Council has added to this land use flexibility by removing certain development restrictions, for example the removal of the office size cap that applies to other parts of Dublin City. The non-statutory 2007 Masterplan map for the area has further elaborated upon this “town centre” mixed use zoning by indicating the suitability of particular uses at selected locations. For example, office use is indicated for Santry Cross and this area now has two solicitor’s offices.

Examination of the lists of uses that are “permissible” and “open to consideration” in the Dublin City Development Plan 2011-2017 indicates that the Council has demonstrated maximum flexibility in the uses allowed in this District Centre. This approach needs to continue in order to encourage occupation of remaining vacant units.

Complementary uses

The identification of specific non-retail uses that could be attracted to Ballymun was also a requirement of the Retail Study. The household survey revealed a demand for a coffee house/café and family friendly restaurant (20% of respondents), as well as a public house (8%). The B4B workshop specifically suggested that a new restaurant could feature as a

Fig 7.8 Café/Restaurant example

high rise unit in the existing Metro hotel. It is anticipated that the best prospects for investment in these complementary uses is linked to a prior increase in footfall levels secured by retail development.

The household survey also recorded a desire for a cinema (24% of respondents). However, the recent opening of the Odeon Cineplex at Charlestown in October 2015 means that there may not be market capacity for this now. This market limitation equally applies to the prospects for a bowling alley in Ballymun, a leisure use which is also due to open at Charlestown in early 2016.

The draft Dublin Development Plan 2016-2022 seeks to promote Ballymun as a leading arts and cultural hub serving the city and wider region (p130). Uses associated with this vision may offer additional opportunities for complementary development in the future.

Car parking

From a quantitative perspective there is adequate parking provision available in Ballymun. This viewpoint is corroborated by the finding that Clearwater Retail Park has nearly the same number of parking spaces as Ballymun (560 versus 450) yet has three times the level of retail floorspace. However, there are issues relating to the long term injudicious use of the most convenient spaces in Ballymun, as well as limited onstreet availability due to the strategic traffic function of the R108 regional road. Greater regulation, improved signage and formalization of parking areas will all feature in a future parking strategy for Ballymun.

Layout and design

As a facilitator of retail development in Ballymun it is imperative that the Council's design guidance for a given site offers sufficient flexibility to encourage submissions by developers and end-users alike.

In contrast to the layout of the former shopping centre, which was orientated away from the road, new retail development in Ballymun should be carefully designed to maximize its prominence on the R108 and to harmonize with the existing plaza area opposite. It should command high visibility with its frontage directly or partially facing the roadside. It should be conveniently linked to surrounding businesses and this may require detailed consideration of shared access arrangements, pedestrian crossing points, etc.

It is acknowledged that DCC encourages high density development on Z4 lands. However, there is a need to recognize that retail end-users generally prefer to operate from freestanding, single storey outlets. They are primarily interested in occupying a building for a single use as opposed to one with other uses above. Accordingly, in order to maximize retail investment opportunities, it may be prudent to consider a mix of building heights within a proposed scheme. Understandably, this implies that only a large site will allow this to take place.

7.5 Implementation

Nothing in this document should be read as a commitment that public resources will be provided for any specific proposal. All proposals would have to be subject to economic appraisal and the overall availability of public funding.

7.6 Conclusion

All of the key findings and objectives in this Retail Study pertaining to retailing, the public realm and management of the District Centre are summarised in the preceding tables 7.3, 7.4 and 7.5.

Clearly, there is ample scope to develop retail space in Ballymun given the excessive level of expenditure leakage from its catchment. Equally, there is potential to develop this retail space in conjunction with redevelopment proposals and environmental initiatives in the area.

While it is recognised that market realities and business viability models will ultimately determine how much retail floorspace will be built in Ballymun in the coming years this Retail Study is intended to assist the Council and the community in planning for such development up to the year 2022.

Appendices:

- **Appendix 1 Surveyed County Address of IKEA Shoppers**
- **Appendix 2 Copy of Questionnaire**
- **Appendix 3 Household Shopper Survey Results for Ballymun**
- **Appendix 4 Retail Expenditure Guide 2014-2015**
- **Appendix 5a Report of Consultations**
- **Appendix 5b B4B Meeting Note**

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