Appendix 3.1:
Retail Impact Assessment

3.1.1 INTRODUCTION

The purpose of this Retail Impact Assessment is to provide an assessment of the impact of the retail element of the proposed Phase 1B neighbourhood centre within O'Devaney Gardens. The Retail Impact Statement has specifically been prepared to address the following comments form An Bord Pleanála in respect of the contents of the Environmental Impact Assessment:

"Having regard to the commercial element proposed within Phase 1B, and depending on the intended nature of uses of those commercial units, the EIS should demonstrate that the provision of neighbourhood retail facilities is appropriate to the subject location".

"In the greater Masterplan proposals for the overall site, and the proposal for a mixed use retail complex in Phase 1B, a Retail Impact Assessment should be undertaken, and its findings considered against the Dublin Retail Strategy in this regard".

The Retail Impact Assessment will provide an analysis of the relevant retail planning policy and a detailed qualitative and quantitative assessment of the capacity for the scale of development proposed. A household survey was also undertaken within the catchment area to identify the requirement for neighbourhood shopping facilities within the redeveloped O' Devaney Gardens Complex. In the compilation of this RIS, consideration has been given to all relevant national, regional and local policies documents including the following:

- Retail Planning Guidelines 2005
- Retail Planning Strategy for the Greater Dublin Area 2008-2016
- Dublin City Development Plan 2005-2011
- Draft Dublin City Development Plan 2011-2017

3.1.2 SITE LOCATION AND DESCRIPTION

O' Devaney Gardens is located approximately 1 km west of the City Centre and bounded to the north by the North Circular road, to the south by Montepelier Park, to the east by St Bricin's Military Hospital and to the west by Montpelier Gardens.

The site is located within an area identified for "consolidating the City Centre" within the Dublin City Retail Hierarchy. The nearest retail and services centre serving this development id Stoneybatter.

The site is currently occupied by 9 no. 4 storey residential blocks and temporary structures accommodating a grocery shop, a sports pitch (unused), a playground, community facilities (temporary structure for childcare and apartment No 34 used for community services) and two vacant sites which were formerly occupied by apartment blocks (since demolished) and two storey shops.

3.1.3 PROPOSED DEVELOPMENT

A full description of the proposed development is set out in Chapter 2 of this EIS. Phase 1B of the proposed development is envisaged within the Masterplan as a mixed use neighbourhood centre inclusive of a retail supermarket, local shops and offices and community facilities at first floor level. The remainder of Phase 1B may be developed as a residential scheme (such as a scheme for the elderly). The site of Phase 1B will be developed privately in accordance with a building agreement and the Masterplan.

At Masterplan level, Phase 1B is envisaged to incorporate a two storey neighbourhood building consisting of a supermarket of c1,090m² GFA, other commercial units for either local retail, office or local services totalling c790m² GFA at ground floor and c1,280m² GFA community and/or office space at first floor level.

Although Phase 1B will require its own separate planning application, Phase 1A will include an assessment of the overall Masterplan to ensure that all phases are developed coherently and in a coordinated manner.

The proposed supermarket and other commercial units at ground floor level have an overall gross floor area of 1,880 sq.m. While it is noted that not all commercial uses at ground floor level will be occupied by retail floorspace the full extent of floorspace is assumed for the purposes of this assessment. The overall net floorspace sales figures are calculated by applying a net to gross ratio of 70:100 for convenience floorspace. The net retail area of Phase 1B is therefore assumed at 1,316 sq.m.

3.1.4 RETAIL PLANNING POLICY

Retail Planning Guidelines (2005)

The Retail Planning Guidelines, published in December 2000 and amended in 2005, provide a comprehensive framework to guide both local authorities in preparing development plans and assessing applications for planning permission and retailers and developers in formulating development proposals.

Local Centre or Neighbourhood Centres

O'Devaney Gardens is identified as Strategic Development and Regeneration Area (SDRA) 11 within the 2011-2017 Draft City Development Plan. The Draft City Plan aims to provide for a "*high quality mixed use quarter comprising of quality new homes supported by a complimentary range of mixed commercial, community and recreational facilities"* on the site.

The Retail Planning Guidelines acknowledge that local or neighbourhood centres should comprise of a foodstore and other non food retail and retail service facilities. It is stated in the Guidelines that:

"Local shops located in local centres or neighbourhood centres perform an important function in urban areas. They can provide a valued service, catering particularly for the daily or casual needs or nearby residents or those passing by. Local shops encompassing both foodstores and important non food outlets such as pharmacies have significant social and economic

functions; they offer a particularly important service for those who are less mobile, especially the elderly and disabled people, families with small children, and those without access to a car. For example, in peripheral housing estates they may provide the only readily accessible shopping facilities" (Retail Planning Guidelines, 2005: 37, par. 95)

The Guidelines envisaged that neighbourhood or local centres should comprise of an anchor supermarket or grocery store complemented by a range of other smaller retail/retail service units including non food outlets. The proposed retail floorspace within Phase 1B includes a supermarket and a range of non food retail and retail service units.

Size Thresholds for Neighbourhood Centres

The Guidelines do not prescribe specific thresholds for a neighbourhood or local centre. The Guidelines do prescribe an indicative size threshold of between 10,000 sq. m and 20,000 sq. m. of net retail floorspace for 'District Centres' which are at the next level of the retail hierarchy above local or neighbourhood centres. Therefore, it can be deduced that a retail centre below the 10,000 sq. m threshold for a District Centre can be considered a local or neighbourhood centre.

The proposed development has a net retail area of approximately 1,316. Therefore, it is a neighbourhood/local centre scale and reflects the objective of the 2011-2017 Draft City Development Plan for O' Devaney Gardens which aims to provide for a "*high quality mixed use quarter comprising of quality new homes supported by a complimentary range of mixed commercial, community and recreational facilities" on the site.*

The proposed development includes the key elements of a neighbourhood centre with a medium sized supermarket, and a number of other retail/retail service units. The proposed development contains 1,316 sq.m. net convenience retail floor space which is aimed at providing for the local community and its immediate area.

The quantum of floorspace proposed reflects the need to provide a diverse range of retail facilities within walking distance of the large residential and employment population in the vicinity of O' Devaney Gardens.

There is very little retail provision the west and south of the site and as such it is considered that this provision of mixed retail space will enhance the vibrancy and vitality of the area, and sustain the local community through the very fact that it is proposed to be located at the very heart of the proposed development. It will serve to reduce the distance in which the residents of the O'Devaney Gardens area must travel in order to purchase their goods.

Retail Strategy for the Greater Dublin Area 2008 – 2016

The Retail Strategy for the Greater Dublin Area 2008 – 2016 was adopted on the 17th July 2008. The retail strategy was prepared by the Dublin and Mid-East regional Authorities in conjunction with the relevant planning authorities and the DoEHLG. The Retail Planning Strategy's primary purpose is to inform the statutory planning process and to ensure that adequate provision is made for retail development. It provides indicative advice on the scope and need for new retail floorspace and how, in accordance with sustainable planning, such floorspace should be allocated.

The Strategy indicates that, since the adoption of the previous Retail Planning Guidelines (RPG's) for the Greater Dublin Area (GDA) in November 2001, the GDA has seen significant economic and population growth. One of the primary purposes of the Strategy is to provide:

"indicative advice on the scope and need for new retail floorspace and how, in accordance with sustainable planning, it should be allocated".

Future Retail Floorspace Provision

The Strategy sets out an extensive range of factors and criteria that require to be addressed in respect of retail developments. Amongst these factors and criteria are the following:

- Impact and cumulative impact of proposed developments within Council's administrative areas and on adjoining areas and the GDA as a whole;
- Additional benefits in respect of regeneration and employment do not constitute indicators for need for additional floorspace. However, they may be a material consideration in the site selection process. The weight to be given to such factors will depend on local circumstances.

The retail development associated with the proposed development is intended to be convenience floorspace aimed at meeting the needs and requirements of the local community. It is not envisaged that there will be any effect upon the city centre or existing centres in proximity to the site, with the retail floorspace aimed at meeting the needs of the local community only. It is envisaged that the retail floorspace will assist in the development of a sustainable mixed use community as part of the overall redevelopment of the O' Devaney Gardens complex.

Retail Provision in Suburban Areas

The Retail Strategy sets out the following policy objectives which support the provision of retail floorspace within suburban areas:

"in the suburban areas, to support the hierarchy of retail locations (district, neighbourhood and local) that serve the requirements of the city population"

"the older suburbs where convenience shopping is dated and the populations of these areas are driving unnecessary distances to more attractive shopping centres for their daily shopping needs"

"In line with the principle of sustainability, it is desirable that "daily shopping" which encompasses convenience, speciality and retail service shopping such as supermarket, chemist florist, new agency, dry cleaner, off licence/wine store and hair dresser should be "walk to" or accessible by public transport"

The results of the household survey set out in Section 3.1.7 of this report outline that the respondents from O' Devaney Gardens use the existing grocery shop within the complex for their day to day, or "top-up" purchases, with 71% of respondents from this area stating this as their top up shopping location. This demonstrates the requirement for convenience retail facilities within the development. In accordance with the objectives of the Retail Strategy for the Greater Dublin Area the proposed development aims to provide locally accessible shopping for the more regular needs of communities.

Definition of Neighbourhood Centres:

The Guidelines define neighbourhood centres as follows:

"These centres generally provide for one supermarket or discount foodstore ranging in size from 1,000-2,500 sq.m with a limited range of supporting shops (one or two low range clothes shops with grocery, chemist etc.) and retail services (hairdressers, dry cleaners, DVD rental) cafes and possibly other services such as post offices or community facilities or health clinics grouped together to create a focus for the local population".

The proposed retail development within O' Devaney Gardens provides for an anchor supermarket (1,090 sq.m. gross floor area) and a range of ancillary uses (with a gross floor area of 790 sq.m.) and is in accordance with the size thresholds for neighbourhood centres as set out within the Retail Strategy for the Greater Dublin Area.

Future Retail Demand

The Retail Strategy for the GDA seeks to provide a broad indication of the scale of retail need over the period to 2016 for convenience and comparison goods. It advises caution in interpreting the figures stating:

"The Retail Planning -Guidelines for Planning Authorities - the Department of Environment, Heritage and Local Government guidance document advises that Retail Strategies should assess the broad requirement for additional development over the plan period and that these assessments of future retail requirements are intended to provide ***broad guidance*** *as to the additional quantum of convenience and comparison floorspace provision".*

The projected convenience goods need for Dublin City Council to 2016 is circa 46,000m2 or circa 58,000m2 of taking into account a flexibility factor of 25%.

Table 1: Projected Floorspace Needs for Dublin City up to 2016

Projected Floorspace Needs for Dublin City up to 2016				
Gross Lettable Floor Space Need (m^2)	**Low Projection**	**High Projection**	**Flexibility Factor* 20-25%**	**Total**
Convenience Shopping	46, 300	46, 300	11, 575	57,875
Comparison Goods	217,500	296,600	54,375 – 74,150	271,875 – 370,750
Total	263,800	342,900	65,950 – 85,725	329-750 – 428, 625

The retail strategy emphasises that the figures should not be treated in an ***overly prescriptive*** manner and should not seek to inhibit competition. On this basis, it states that it is not the intention of the strategy to present the figures as some form of cap on retail permissions for each Council, but to guide the scale of overall provision of retail; whilst taking into account the need to provide more local retail to reduce long distance travel for lower order shopping and encourage local provision of regular shopping needs. The proposed neighbourhood centre is very modest in the context of the scale of retail floorspace envisaged in the Retail Stratgey.

Conclusion

The policy framework assessed above highlights the need for appropriate retail facilities in designated areas to prevent unnecessary travel patterns out of the area to more attractive retailing centres and identifies the need for increased levels of retail facilities within suburban areas.

The proposed retail provision within Phase 1B of the redevelopment of O' Devaney Gardens is in accordance with the aforementioned objectives. The development is easily accessible to consumers from the adjoining residential catchment and by both public transport and private car and in a location which encourages multi puropose trips.

The proposed development will help enhance a sustainable retail hierarchy in the area by fulfilling the objective to develop a neighbourhood centre at this location. The scale and quantum of retail floorspace proposed reflects the extent of the residential and employment population in the area. The proposed development does not include any higher order floorspace and therefore will not impact upon the higher order centres.

3.1.5 LOCAL LEVEL POLICY

Draft Dublin City Development Plan 2011-2017 - Dublin City Retail Strategy

The Retail Strategy set out within the 2011-2017 Draft City Development Plan outlines that retail developments should relate to the hierarchy, should locate within designated centres and should be of a scale that is compatible with the function of the centre.

Retail Hierarchy

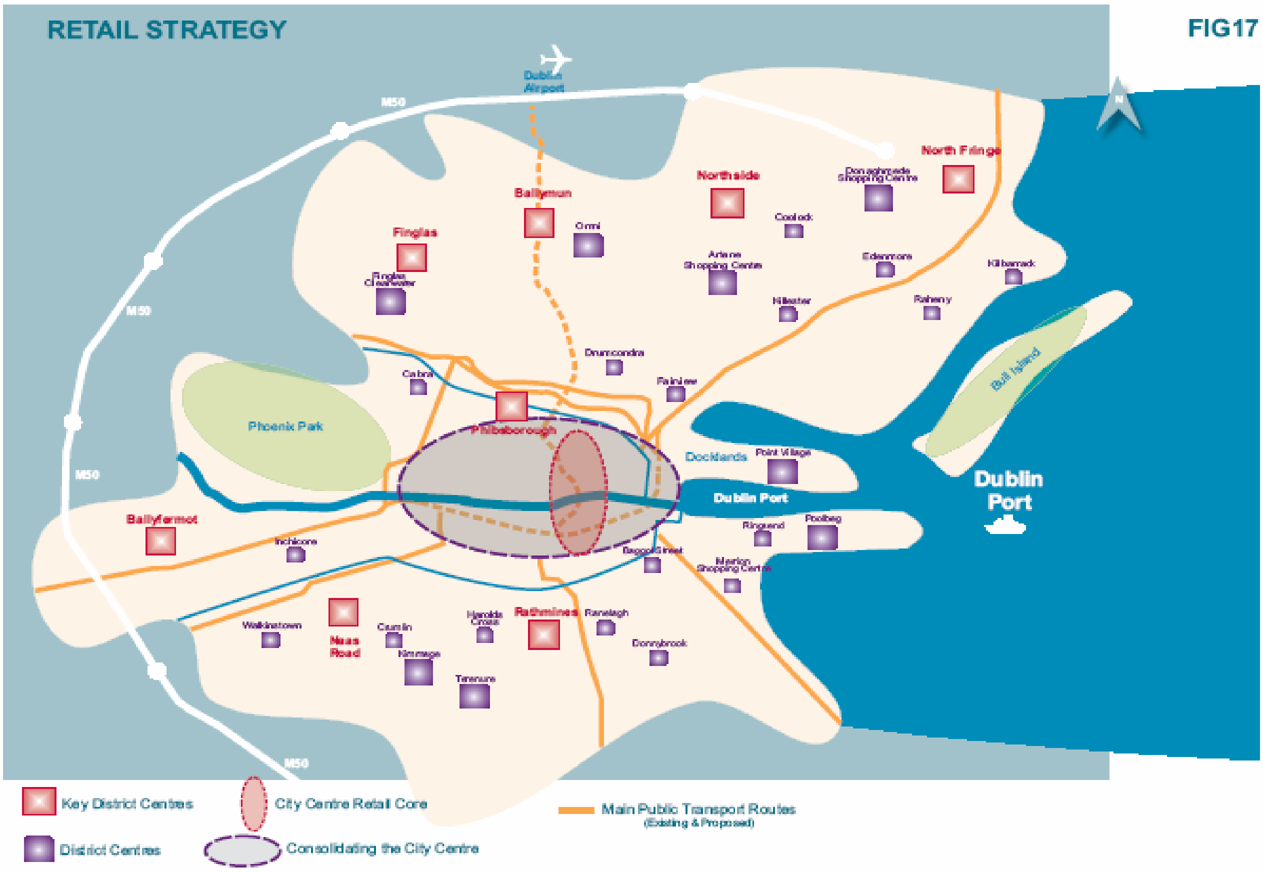
The Retail Strategy for the Greater Dublin Area sets out a five tier retail hierarchy, all of which are represented in the City Council area, except for Level 2 which is for large towns in other local authority areas including Tallaght, Swords, Dun Laoghaire and Dundrum.

Table 2: Retail Centres Hierarchy

Retail Centres Hierarchy		
Level	**GDA Classification**	**Dublin City Classification**
Level 1	Metropolitan Centre	City Centre Retail Core
Level 2	Major Town Centres & County Towns	None
Level 3	Town / District Centres & Sub-County Town Centres	District Centres
Level 4	Neighbourhood Centres	Neighbourhood Centres
Level 5	Corner Shops	Local / Corner Shops

Figure 17 of the Draft City Development Plan illustrates the retail hierarchy for the City.

Figure 1: Dublin Retail Hierarchy



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O' Devaney Gardens is located within the area identified for consolidating the City Centre as defined within figure 17 of the retail strategy.

O' Devaney Gardens is location within the area identified for "consolidating the City Centre" within the City Centre Retail Hierarchy. The retail strategy outlines that *"new retail developments should respect this hierarchy and shopping provision should be appropriate in scale and character to the role of the centre within the hierarchy".*

Level 4 Neighbourhood Centres

The Draft City Retail Strategy outlines that: *"The primary purpose of a neighbourhood centre is to provide for the daily shopping needs or local services within a residential community and form an important element of a sustainable neighbourhood".*

The Retail Strategy for Dublin City seeks to ensure the provision of convenience shopping and supermarkets so as to cater for the daily shopping needs of communities throughout the city in a sustainable manner. The proposed development will help ensure a sustainable retail hierarchy by providing an appropriate level of neighbourhood retail facilities for the existing and proposed residential population of the area.

Criteria for Assessing Future Retail Floorspace

The Draft Retail Strategy notes that:

"In determining the allocation of the projected additional floor-space, and in accordance with the requirements of the Retail Planning Guidelines for Planning Authorities and the criteria influencing the RS/GDA, the following will be taken into account in the determining the location and scale of additional retail floor-space".

- The availability of public transport to serve the retail centre;
- Current population catchment and areas of projected population growth;
- Current availability of retail floor-space in each part of the city;
- Potential impact on the vitality and viability of existing and permitted retail centres;
- The sequential approach to site assessment;
- Relevant provisions of Local Area Plans, Schematic Masterplan and other Local Plans.

The proposed retail element of the Phase 1B development is assessed against these criteria as follows:

The availability of public transport to serve the development

The subject sites' location in proximity to the city centre ensures that the primary means of travel will be by sustainable means such as walking and cycling. The proposed development, which is located to the west of Dublin City Centre, is convenient to an efficient public transport service and facilities are also provided for cyclists and pedestrians in this area, providing a genuine alternative to car borne journeys, especially during peak periods.

Current population catchment and areas of projected population growth

The proposed development will help ensure a sustainable retail hierarchy by providing an appropriate level of neighbourhood retail facilities for the existing and proposed residential population of the area. Having regard to the available expenditure and growth in population and in retail expenditure generally the development will not adversely affect the existing retail shopping outlets in a significant adverse way.

Current availability of retail floor-space in each part of the city

The proposal to provide for local convenience floorspace provision is site specific to the O' Devaney Gardens complex. Having regard to the limited scale (1,316 sq.m. net) and local nature of the retail floorspace proposed it is not considered that it will have an impact on the wider City area.

Potential impact on the vitality and viability of existing and permitted retail centres

The proposed development will help enhance a sustainable retail hierarchy in the area by fulfilling the objective to develop a neighbourhood centre at this location. The scale and quantum of retail floorspace proposed reflects the extent of the residential and employment population in the area. The proposed development does not include any higher order floorspace and therefore will not impact upon the higher order centres.

The sequential approach to site assessment

The 2011-2017 Draft City Development Plan outlines the following in terms of a requirement for a sequential test assessment *"A sequential test is appropriate where a retail development over circa 2,000 m2 is proposed outside of a Z3 (neighbourhood), Z4 (district), Z5 (city centre), Z10 (mixed use), or Z13/14 (regeneration areas)".*

O' Devaney Gardens is designated as a regeneration area within both the existing and Draft Dublin City Development Plan and in this context it is considered that it is an appropriate location for retail development.

Relevant provisions of Local Area Plans, Schematic Masterplan and other Local Plans.

The subject application for development of Phase 1A of O' Devaney Gardens is accompanied by a detailed Masterplan prepared by Dublin City Council which sets out a framework for the future development of the overall site. Phase 1B will consist of the mixed use neighbourhood centre and residential units. The Masterplan sets out a vision for this area which will be the subject of a separate planning application for the detail.

At Masterplan level, Phase 1B of the development is envisaged to incorporate a two storey neighbourhood building consisting of a supermarket of c1,090m^2 gross floor area, other commercial units for either local retail, office or local services totalling c790m^2 gross floor areas at ground floor and c1,280m gross floor area community and/or office space at first floor level.

The development of retail as part of an overall mixed use development of the Masterplan site is also in accordance with the guiding principles for the development of O' Devaney Gardens as set out within the 2011-2017 Draft City Development Plan which require:

The development of a high quality mixed use quarter comprising of quality new homes supported by a complimentary range of mixed commercial, community and recreational facilities will be promoted for this site.

3.1.6 QUALITATIVE ASSESSMENT

Annex II of the Retail Planning Guidelines sets out the matters that should be taken into account when determining the vitality and viability of town centres. It is based on a qualitative analysis of factors such as the range and quality of activities in a centre, the mix of uses, the accessibility of the centre to people living in the area, and the general amenity, appearance and safety of the area. Indicators of a healthy town centre include a low level of vacancy, a high pedestrian footfall and a pleasant and inviting public realm which is well maintained.

The Retail Planning Guidelines provide a comprehensive checklist of information to be included in a health check assessment. It is stated in the Retail Planning Guidelines:

"The concept of vitality and viability is central to maintaining and enhancing town centres. It will depend on many factors, including the range and quality of activities in a centre, its mix of uses, its accessibility to people living and working in the area and its general amenity, appearance and safety. A healthy town centre which is vital and viable balances a number of qualities including: attractions, accessibility, amenity and action".

These are further defined as follows:

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

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

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

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

As noted in Section 3.1.5 of this assessment, O' Devaney Gardens is located within the area identified for consolidating the City Centre as defined within figure 17 of the retail strategy. Nearby Level 3 district centres include Cabra and Phibsboro but these are not located within the catchment area defined for the purposes of this assessment as illustrated in Figure 2 below.

The largest centre within the identified catchment area is Stoneybatter. This centre is identified as a market street within the Draft City Development Plan and is also located within the area identified for consolidating the City Centre within the retail strategy.

Attractions:

A landuse survey of ground floor (street level) uses was undertaken by Dublin City Council to examine the existing character of the village centre and highlight the extent of services provided for. This identified that the centre is currently occupied by a wide range and mix of uses which contribute to its overall vitality.

The Tesco anchored Parkview Shopping Centre is located at the northern end of Stoneybatter which includes a Tesco Supermarket and accompanying retail units and services including a butchers, DIY, Travel Agents, Post Office, Pharmacy, Takeaway, Gym etc.

Towards the southern end of the village, a variety of independent commercial uses are established on both sides of the street including cafes, newsagents, clothes shops, florist, DIY, off license, public houses, butchers shops, hair and beauty salons etc. Centra operate from neighbourhood scale supermarkets on both sides of the street. There are light industrial activities accessed from Manor Street operating from buildings behind the main street line in this location.

Amenity:

A strong feature of the village is the presence of terraced housing with direct front door access and, on the west side of the street, private gardens directly adjoining the village centre street. This creates a positive visual impression along the streetscape and mixes the uses of the village with commercial and residential life beyond business hours.

Actions

The 2011 Draft City Development Plan outlines the following objectives for the Stoneybatter area:

"The radial market streets such as Thomas Street, Camden Street and Manor Street /Stoneybatter and others add greatly to the character and vitality of the city but many of these streets are now being challenged to adapt to new retailing demands. Better physical integration and pedestrian linkages would benefit both the market streets and the centre".

A household survey was undertaken as part of the retail impact assessment which accompanies this report. Respondents to the household survey were asked to identify how shopping in Stoneybatter could be improved. 31% of respondents referred to the need for "better variety/more speciality shops", 26% referred to the requirement for "better parking", while 15% of the respondents referred to the need for a major supermarket.

Conclusion

The site of O' Devaney Gardens is closely linked with Stoneybatter. However, notwithstanding the connections between Stoneybatter and O' Devaney Gardens, the results of the household survey undertaken in conjunction with this assessment highlights that 51% of the respondents from O' Devaney Gardens rarely/never undertook shopping in Stoneybatter.

In the creation of a new high quality sustainable neighbourhood on the site of O' Devaney Gardens, there is an opportunity to strengthen the synergies between the site and Stoneybatter which functions as a village centre servicing the residential community around it. New uses proposed as part of the regeneration will complement the functions of Stoneybatter as a service centre. The regeneration of O' Devaney Gardens will provide a catalyst for regeneration in Stoneybatter.

Smithfield

Other centres within the catchment area include Smithfield. Smithfield is located in close proximity to Stoneybatter and accommodates a wide variety of uses including residential, commercial, community. Leisure uses within Smithfield include the Maldron hotel, Fresh supermarket, gym, medical; centre, restaurants, cinema etc present opportunities for positive interaction between Smithfield, its public space and the Stoneybatter area. The LUAS station at Smithfield in particular is an important public transport service for residents in the locality.

3.1.7 HOUSEHOLD SURVEY AND ANALYSIS

A household survey was undertaken in order to establish the existing shopping patterns within the catchment area for different retailing types including clothing footwear and food. The survey also aimed to obtain view of respondents from the catchment area on the proposals for neighbourhood centre retail facilities within the redeveloped O' Devaney Gardens complex.

The survey was carried out by Demographics Ireland, an established independent survey company. It was carried out by telephone on a sample of households from the catchment area in October and November 2010. In total 182 people were interviewed within the catchment area.

Section 1: Food and Grocery Shopping

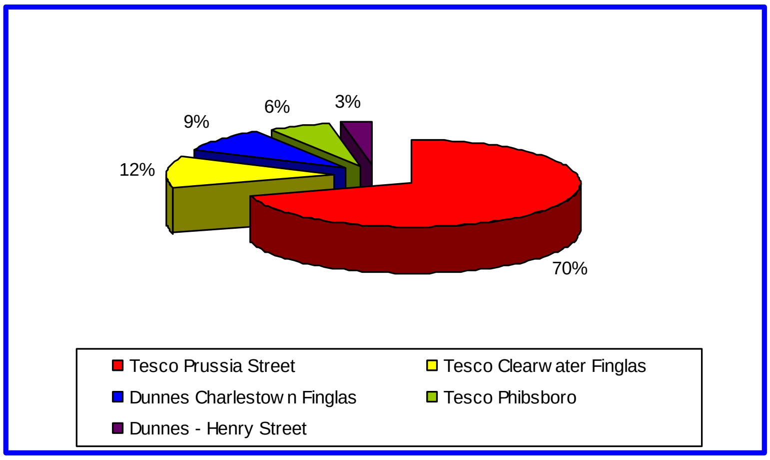
In terms of shopping for food and groceries, respondents were asked which town, shopping centre, retail location or shop they normally visited for these purposes. The majority of persons within the catchment area (64%) use the Tesco store in Prussia Street for their mainly weekly food and grocery purchases.

Table 3: Locations of Main Food and Grocery Shopping

	AREA						
	ED	Arran Quay B	Arran Quay C	Arran Quay D	Arran Quay E	Cabra East C	O'Devaney Gardens
	Area	Grange gorman	Smithfield	O'Devaney Gardens Environs	Prussia St.	North Circular Rd	
Base	181	31	18	30	30	38	34
Tesco Prussia Street	113	21	3	22	22	21	24
Tesco Clearwater Finglas	10	-	-	2	1	3	4
Tesco Jervis Street	9	2	6	-	-	1	-
Dunnes Stores Charlestown Finglas	6	-	1	-	-	2	3
Tesco Phibsboro	5	1	-	-	-	2	2
Lidl – Moore Street	4	1	1	1	1	-	-
Marks & Spencer's - Jervis Centre	4	1	1	2	-	-	-
Aldi – Parnell Street	3	-	-	2	1	-	-
Lidl - Glasnevin	3	1	-	-	1	1	-
Blanchardstown SC	3	-	-	-	-	3	-
Dunnes – Henry Street	2	-	-	1	-	-	1
Dunnes – North Earl Street	2	-	2	-	-	-	-
Centra - Manor Street	2	1	1	-	-	-	-
Fresh - Smithfield	2	-	-	-	1	1	-
SPAR - North King Street	1	1	-	-	-	-	-
Other	12	2	3	-	3	4	-

70% of the residents within the O' Devaney Gardens complex also use the Tesco in Prussia Street for their main food and grocery shopping.

Figure 2: O'Devaney Gardens – Main Food and Grocery Location



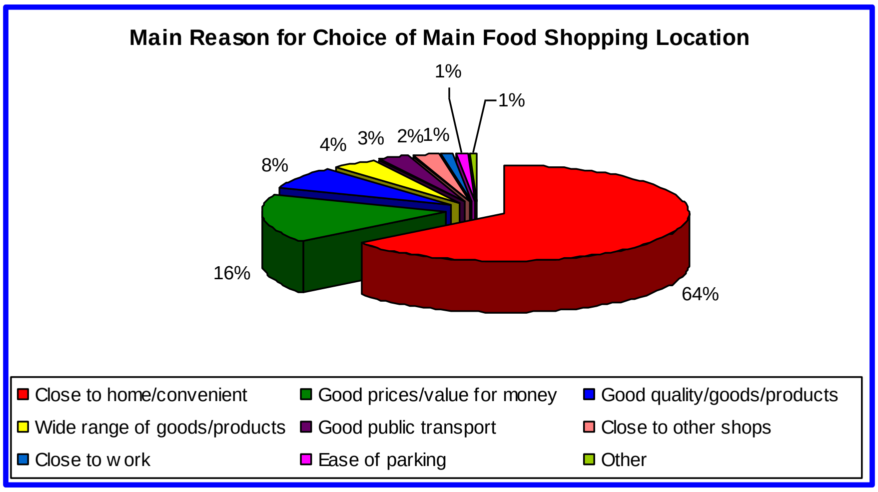
Main reasons for choice of centre for Grocery/food shopping

Respondents were asked to identify their main reasons for shopping at the locations where they do their main food/grocery shopping. The results of this are shown in Table 4 below. 64% of respondents outlined that their main reason for choosing their main food/grocery shopping location related to its "proximity to home/convenience". Other main reasons included "value for money" (16%), "quality of goods/products" (8%), "range of goods" (4%) and "good public transport" (3%).

Table 4: Main Reasons for Choice of centre for Grocery/ food shopping

Reason	Number	%
Close to home/convenient	117	64
Good prices/value for money	30	16
Good quality goods/products	14	8
Wide range of goods/products	7	4
Ease of parking	2	1
Close other shops	4	2
Close to work	2	1
Other	1	1
Good public transport	5	3

Figure 3: Main Reason for Choice of Main Food Shopping Location



74% of the respondents from the O'Devaney Gardens area stated that their main reason for choosing their main grocery/ food shopping location was "proximity to home/convenience". Other key determinants within this area included "close to other shops" (11%) and "good public transport" (9%).

Top Up Shopping

Respondents were asked where they would normally do their top-up food and grocery shopping. Tesco Prussia Street is the main top up store for people living within the surrounding area, otherwise a wide range of stores are used determined by the place of residence as illustrated in Table 5 below.

Table 5: Top up Shopping Location

Top Up shopping location	Overall Catchment	%	O'Devaney Gardens	%
Tesco Prussia Street	48	27	3	9
Local Shop	29	16	0	0
Existing Shop within ODG	25	14	25	71
Centra Manor Street	24	13	0	0
Lidl Moore Street	8	4	0	0
Fesh Smithfield	6	3	0	0
Aldi Parnell Street	5	3	1	3
Londis Parkgate Street	4	2	3	9
Tesco Jervis Street	3	2	1	3
Dunnes Henry Street	3	2	0	0
Tesco Phibsboro	2	1	0	0
Dunnes North Earl Street	2	1	0	0
Spar North King Street	2	1	0	0
Marks and Spencers Jervis	2	1	0	0
Lidl Glasnevin	2	1	0	0
Tesco Clearwater	1	1	0	0
Other	12	7	2	6
Total Respondents	178	100	35	100

It is noteworthy that the respondents from O' Devaney Gardens almost exclusively use the existing grocery shop within the complex for their day to day purchases, with 71% of respondents from this area stating this as their main top up shopping location. However, none of the respondents from the wider catchment area used the existing grocery shop within the complex demonstrating the lack of integration of the O' Devaney Gardens complex with surrounding areas.

Satisfaction with Convenience Offer

Respondents were asked to rate their satisfaction of the convenience offer in their locality.

In response to this question 21% of the respondents within the wider catchment area outlined that they were very satisfied, 47% were satisfied, 19% indicated that shopping facilities were average, 17% were not satisfied and 6% were very dissatisfied.

Table 6: Satisfaction with Convenience Offer

Satisfaction Rating	Overall Catchment	%	O' Devaney Gardens	%
Very Satisfied	39	21	4	11
Satisfied	85	47	7	20
Neutral	16	9	7	20
Not Satisfied	31	17	12	34
Very Dissatisfied	11	6	5	14
Total	182	100	35	100

However, in contrast to the trends within the overall catchment area, the respondents from O' Devaney Gardens were generally not satisfied with the existing stores within their locality.

The main reasons for dissatisfaction of the O' Devaney Garden respondents with the existing convenience offer within their locality included "poor range" (71%), "too expensive" (18%) and "poor shopping environment" (12%).

Table 7: Reason for Dissatisfaction

Reason for Dissatisfaction	Wider Catchment	%	O' Devaney Gardens	%
Poor Range	24	62	12	71
Too expensive	7	18	3	18
Poor Shopping Environment	4	10	2	12
Other	2	5	0	0
Distance	1	3	0	0
Parking Problems	1	3	0	0
Totals	39		17	

Clothing and Footwear

The results of the questionnaire establish the dominant nature of the City Centre for comparison goods retailing. 85% of the residents surveyed outlined that they undertake their main clothes and footwear shopping in the City Centre. 96% of the respondents from O'Devaney Gardens undertook their main clothes and footwear shopping within the City Centre.

Section 2: Shopping in Stoneybatter

This section of the questionnaire aimed to option opinions on the overall quality of Stoneybatter as a shopping location.

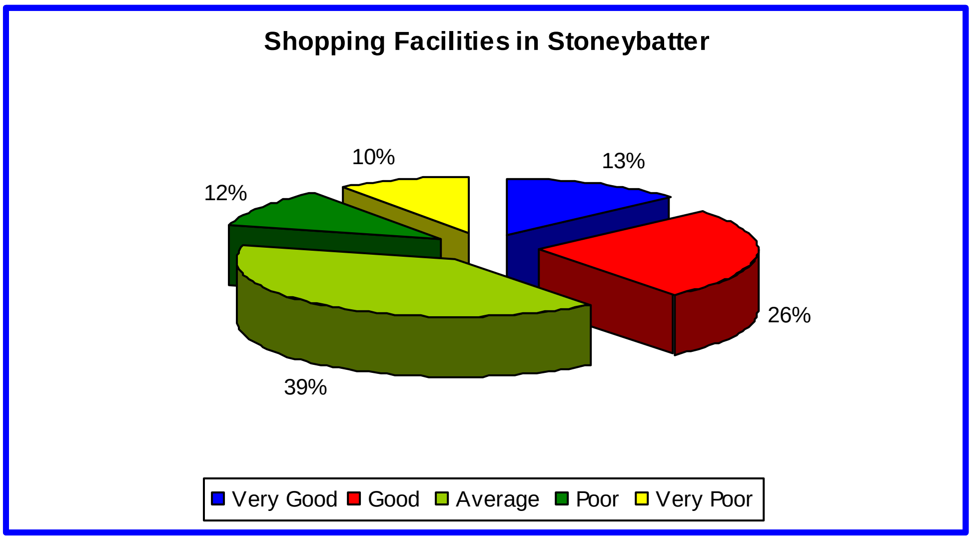
Respondents were initially asked if they shop in Stoneybatter. Just under half of those surveyed within the catchment area (46%) used shops in Stoneybatter Often/Occasionally. 51% of the respondents from O' Devaney Gardens rarely/never undertook shopping in Stoneybatter.

Table 8: Frequency of Shopping in Stoneybatter

	Overall Catchment	%	O' Devaney Gardens	%
Often	35	19	4	11
Occasionally	49	27	13	37
Rarely	45	25	11	31
Never	53	29	7	20
Total	182	100	35	100

Respondents were also asked to rate the existing shopping facilities in Stoneybatter. Shopping facilities within this area were mainly considered to be Good or Average as illustrated in Figure 5 below.

Figure 4: Shopping Facilities in Stoneybatter



When asked to provide a reason for their classification of shopping facilities within Stoneybatter 41% of respondents within the catchment area referred to the bad variety of shops, while 26% of respondents referred to the "good variety of shops".

Changes and improvements needed in Stoneybatter

The respondents were asked to identify how shopping in Stoneybatter could be improved. 31% of respondents referred to the need for "better variety/more speciality shops", 26% referred to the requirement for "better parking", while 15% of the respondents referred to the need for a major supermarket.

Section 3 – O' Devaney Gardens

Section 3 of the questionnaire aimed to obtain views on the inclusion of enhanced neighbourhood shopping facilities within the regenerated O' Devaney Gardens complex.

Respondents were initially asked if they would find additional neighbourhood shopping facilities within the regeneration plan for O' Devaney Gardens beneficial for the local area. Over 80% of respondents stated that the provision of additional neighbourhood shopping facilities would be of benefit for the local area and there were almost unanimous positive responses from O' Devaney Gardens and Prussia Street respondents.

Respondents were then asked to provide a reason for the above answer. The results are illustrated in Table 9 below.

Table 9: Requirements for additional Retail Facilities within Stoneybatter

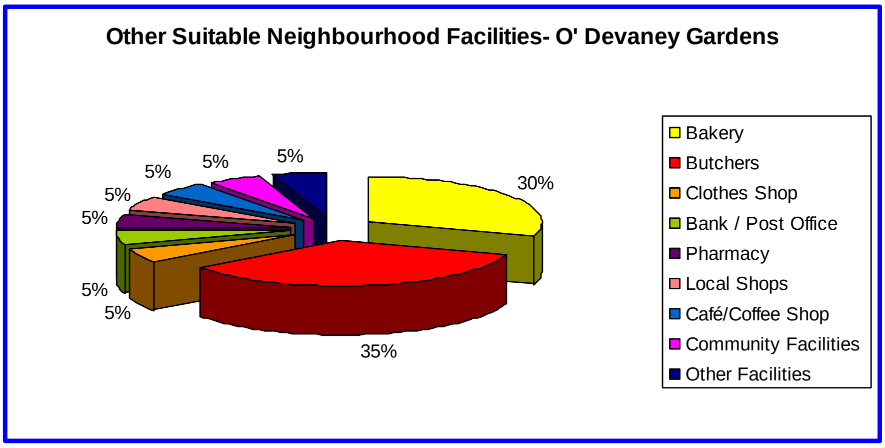
Reason for Response		%
Area needs more variety of shops	44	30
Convenient	31	21
Would improve area	8	5
Lack of shops in the area	5	3
Create jobs	4	3
Bring more people into the area	4	3
More grocery competition	3	2
Area not safe	8	5
Enough shops already	5	3
Not relevant to me	15	10
Other comments	7	5
No opinion	15	10
Total	149	100

There were no replies from the O' Devaney Gardens respondents to this question. 30% of respondents from the wider catchment area noted the requirement for "more variety of shops" within the area. A further 30% of the respondents from this area referred to the convenience of providing additional neighbourhood retail facilities at this location.

This is particularly reflected within the O' Devaney Gardens Environs wherein 37% of respondents referred to the convenience of this location. This is particularly noteworthy given that none of the respondents within this area currently use the existing shop within the O' Devaney Gardens complex for top up shopping.

When asked what other type of neighbourhood facilities would be suitable at this location. 35% of the respondents from O' Devaney Gardens outlined the requirement for a butchers and a further 30% referred to Bakery.

Figure 5: Other Suitable Neighbourhood Facilities



Conclusion

The majority of persons living within the catchment area use the Tesco store in Prussia Street for their main food and grocery purchases and many householders would use this store for day to day top up purposes. The majority of residents within the O Devaney Gardens complex use the existing shop within this area for top up shopping. None of the respondents from any other area within the catchment area use the existing shop within the O' Devaney Gardens complex for top-up shopping.

Results of the questionnaire illustrate that "convenience" is the primary factor why a household chooses to shop at the store where they do their main food/grocery shopping. "Value for Money" is also important for many respondents.

Apart from the residents of O' Devaney Gardens householders within the catchment area are generally satisfied with food and grocery shops within their location. Less than one third of O' Devaney Gardens householders stated that they were satisfied with their local outlets. The reasons given for dissatisfaction generally related to poor range of goods on offer and in a small number of cases (approximately 5%) the shops are too expensive.

Just under half of the respondents shop in Stoneybatter "often" or "occasionally". The panel rated shopping facilities in Stoneybatter as "average" to "good". The main criticism of this area related to the poor variety of shops.

Including neighbourhood shopping facilities within O'Devaney Gardens regeneration project is seen as beneficial by most respondents having regard to its convenient location. Regarding the mix of shops in this location, some basic outlets such as butchers and bakery should be considered.

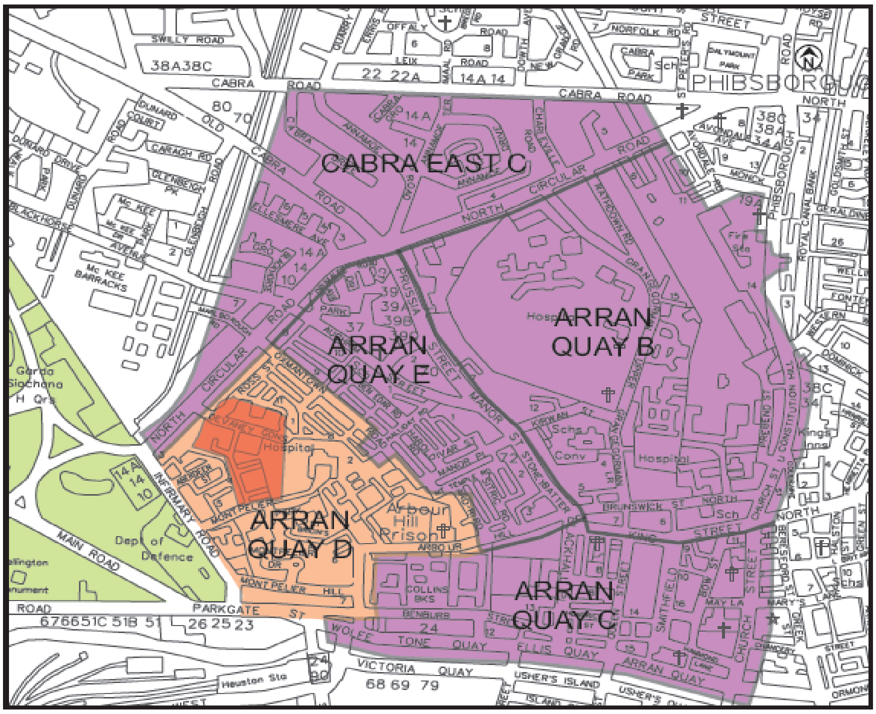
3.1.8 QUANTITATIVE ASSESSMENT

In this section of the report, we set out the quantitative assessment of the quantum of retail floorspace that will be required to serve the existing and future needs of the study area. The base year is 2006 while the test year, is 2015.

Identification of Catchment Area

Given the proximity of O' Devaney Gardens to the city centre and the nature of the retail floorspace proposed within Phase 1B of the development a localised catchment area was assumed for the purposes of this assessment. The catchment is consistent with the wider neighbourhood area set out within the Masterplan document prepared by Dublin City Council which accompanies the application and has taken into consideration the proximity of the proposal to other similar sized developments, physical barriers and accessibility.

Figure 6: Catchment Area



It is noted that under Register Reference 2283/09 (An Bord Pleanála Reference PL29N.204271) permission was granted for a supermarket at Dunard Road in Cabra. This permitted development comprises of approximately 1,993 sq.m. net convenience floorspace and 1,499 sq.m. comparison floorspace. While this development may attract residents from within the defined catchment, having regard to the district centre nature of the development it is located outside of the designated catchment area. The provision of the proposed neighbourhood facilities within O' Devaney Gardens is to service a local role and is dissimilar to the district level functions envisaged for the extant permission at Dunard Road which is beyond reasonable walking distance from the Phase 1B site.

In considering the catchment area for the study regard was had to the realistic trade draw of the proposal. In this context it was considered that most of the footfall would be generated from the existing tenants within the site and surrounding residential areas. There is also possibility for enhanced connectivity between the site and Stoneybatter. Residents south of the Liffey are unlikely to be attracted to the proposed development.

Population of the Study Area

Existing Population

The 2006 census determines a population of 17,247 for the identified catchment area.

The recently adopted Regional Planning Guidelines for the Greater Dublin Area set out regional population targets from 2008 to 2022 and these have been adopted for the purposes of this assessment. Table 4 of the Regional Planning Guidelines set out the following projections for the Dublin Area.

Table 10: Population Projections from Regional Planning Guidelines for the GDA

Dublin	2008	2010	2016	2022
	1,217,800	1,256,900	1,361,200	1,464,200

Source: Adopted from Table 4 of the Regional Planning Guidelines for the GDA 2010-2022

The following growth rates are observed from the population projections set out within the Regional Planning Guidelines

Table 11: Population growth rates set out within the Regional Planning Guidelines

Year	% growth rate per annum
2008-2010	1.6%
2010-2016	1.38%
2016-2022	1.26%

A population increase rate of 1.28% per annum was used to calculate the 2008 population, as this reflects the rate of growth from the 2006 census of population figure for the Dublin area and the 2008 population figure for Dublin as provided in the National Population Projections and Regional Population Targets 2010-2022.

The population projections as set out within the Regional Planning Guidelines have been used to project the future population for the purposes of this assessment. This results in a population of 19,557 for the catchment area in 2015.

Table 12: Catchment Area Population

	Population
2006	17,247
2015	19,557

Assumptions: Growth rates per annum adopted from RPGGDA 2010-2022

Expenditure Per Capita

The Retail Planning Guidelines[1] examine three principal sources of data on retail planning expenditure in Ireland. These are the Annual Services Inquiry, the National Income and Expenditure Accounts and the Household Budget Survey. The Guidelines outline that the most reliable data source for established baseline expenditure is the Annual Services Inquiry. In estimating the expenditure per capita on convenience goods per capita we have

[1] Retail Planning Guidelines for Planning Authorities DoEHLG, January 2005

therefore consulted the most recent Annual Services Inquiry, published in November 2008 which sets out expenditure figures from 2006.

The 2006 Annual Services Inquiry estimates convenience expenditure per capita to be €3,759 in 2006. In order to estimate the expenditure per capita on convenience goods in 2015 (design year) it is normal practice to assume a growth rate from 2006 to the design year. Table A1.2 of the Retail Planning Guidelines for the Greater Dublin Area set out a growth rate of 1.1% for expenditure per capita in convenience goods.

Having regard to the current economic downturn, the RIS has taken into consideration the current economic downturn as it does not provide for any increase in convenience goods expenditure per capita for the years 2006-2011. This is considered a very conservative approach and adequately accounts for the economic downturn from late 2008 to present.

Current analysis as provided by ESRI in the Quarterly Economic Commentary Summer 2010 indicates a resumption of economic growth in 2011. From 2011 onwards therefore we utilise a percentage increase of 1.1% per annum which is consistent with projections utilised in Table A1.2 of the 2008 Retail Planning Guidelines for the Greater Dublin Area and it is considered viable that expenditure levels will increase above 2006 levels from 2011 onwards. The estimate of convenience expenditure per capita is therefore €3,927 for 2015 (2006 prices).

Table 13 – Convenience Goods Expenditure Per Capita

Year	Convenience Goods Per Capita
2006	€3,759
2015	€3,927

Sources: **Annual Services Inquiry 2006**
Key Assumptions: **No growth from 2006-2011, 1.1% increase per annum 2011-2015**

Total Available Expenditure

The total available convenience goods expenditure in 2006 and 2015 attributed to residents in the catchment area is obtained by multiplying the population in each year by the convenience goods expenditure per capita for that year. In 2006 the total available convenience goods expenditure is €64,831,473. This is forecast to increase to €76,804,514 in 2015 – see Table 14 below.

Table 14 – Available Convenience Goods Expenditure (2006 prices)

Year	Available Convenience Goods Expenditure
2006	64,831,473
2015	76,804,514

Sources: Table 1 & 2 (Price Year 2006)

The total available expenditure within the catchment area is assumed having regard to the following reasons and considerations

Turnover of Convenience Floorspace

Existing turnovers of convenience floorspace are established having regard to those set out within the Retail Strategy for the Greater Dublin Area 2008, which estimates an average turnover level of €12,000 per sq.m. for convenience floorspace in 2007 (based on a 2006 price year).

Paragraph 2.11 of the Retail Strategy for the Greater Dublin Area estimates a growth rate of 0.5 % per annum to account for growth in turnover efficiency for convenience floorspace and this has been assumed for the purposes of this assessment. While it is considered that growth in turnover efficiency will be limited in the coming years, the turnover or sales density figures for convenience floorspace has not been reduced to take account of the current economic downturn so there is an element of give and take in relation to the impact of the downturn on future floorspace projections, which should be considered in the assessment. The turnover figures for 2006 and 2015 are therefore set out in Table 15 below.

Table 15 – Convenience Floorspace Turnover

Year	Turnover (€ per sq. m.)
2006	€12,000
2015	€12,551

Assumption: 0.5% growth rate per annum from 2006-2015

Existing Convenience Floorspace within the Catchment

There is limited supply of large – scale convenience retail facilities within the catchment area identified. The largest centre within the catchment is the Tesco anchored Park Shopping Centre in Stoneybatter comprises approximately 1,579 sq.m. net of convenience floorspace.

Other convenience facilities within Stoneybatter include 2 no. centra stores on Prussia Street and a number of local newsagents. Stoneybatter also has direct linkages with the Smithfield area which is also located within the defined catchment area.

Existing convenience floorspace in Smithfield includes a Fresh Supermarket on Queen Street which fronts onto market square. A number of small scale convenience retail units are also located along Cabra Road. There will invariably be further small elements of convenience retailing within the catchment area. For the purposes of this assessment a figure of 2,000 sq.m. net is assumed for to account for small and medium scale floorspace within the catchment area. This results in an overall provision of 3,579 sq.m. net of convenience floorspace.

Table 16: Existing Convenience Floorspace in the Catchment Area

Area	Estimated Net Convenience Floorspace Provision (sq.m)
Tesco, Park SC	1,579
Other convenience floorspace within catchment area	2,000
Total sq.m.	**3,579**

Turnover of Existing Convenience Floorspace within the Catchment

As outlined above, the 2008 Retail Strategy for the Greater Dublin Area estimates that existing retail units in the city had a turnover of €12,000 per square metre in 2006. In accordance with the Retail Strategy a growth rate of 0.5% per annum is applied to this figure to project it to the 2015 design year. The total turnover of existing convenience floorspace in the catchment is calculated in Table 17 below.

Table 17: Turnover of Existing Convenience Floorspace within the Catchment Area

Existing Convenience Floorspace within the catchment	Turnover per sq.m. of Existing Floorspace	Turnover of Existing Floorspace within the catchment
3,579 sq.m.	€12,551	€44,919,768

The capacity for additional convenience floorspace is obtained by subtracting the total turnover of existing convenience floorspace within the catchment area from available convenience expenditure. The capacity for additional convenience floorspace within the catchment area is set out in Table 18 below.

Table 18 - The Capacity for Additional Net Convenience Floorspace

Year	Available Expenditure	Total Turnover of Existing Floorspace	Available Surplus
2015	€76,804,514	€44,919,768	€31,884,747

Sources:

It is estimated that there will be an available surplus of €31,884,747 in the year 2015 when existing floorspace is taken into consideration. The turnover of the proposed retail floorspace is set out in Table 19 below

Table 19– Turnover of Proposed Store

Year	Net Sq. M.	Turnover (€ per sq. m.)	Total Turnover
2015	1,316	€12,551	€16,517,020

Therefore, even when the proposed development is open and operating there would still be a surplus of expenditure of €15,367,727 – see Table 20 below.

Table 20 – Capacity for the Proposed Development

Year	Available Surplus of Expenditure	Turnover of Proposed Store	Resulting Surplus of Expenditure
2015	31,884,747	€16,517,020	€15,367,727

Sources: Tables 5 & 8

Therefore, it is concluded that there is more than adequate capacity in 2015 for the proposed neighbourhood development and this is assuming a closely defined catchment area to serve the proposed development. The proposed development will not have an adverse impact of any significance on the existing retail provision in the catchment area.

3.1.9 COMPLIANCE WITH PARAGRAPH 65 OF THE RETAIL PLANNING GUIDELINES

The Retail Planning Guidelines state:

"In making a planning application for retail development which local authorities consider to be large scale in relation to existing town centres, the onus is on the applicant to demonstrate compliance with the development plan and that there will not be a material adverse impact on the vitality and viability of any existing town centre. In submitting evidence in relation to retail impact the applicant shall address the following criteria and demonstrate whether or not the proposal would":

The Retail Planning Guidelines set out in paragraph 65, a list of criteria, which retail developments should meet. The following provides an assessment of the proposal in the context of these specific criteria.

(a) "Will it support the long term strategy for town centres as established in the Development Plan and not materially diminish the prospect of attracting investments to one or more town centres?"

The subject site is zoned Z14, the objective of which is to *"seek the social, economic and physical development and / or rejuvenation of an area with mixed use of which residential and 'Z6' would be the predominant uses" within the Draft City Development Plan.*

O Devaney Gardens is specifically classified as a Strategic Development and Regeneration Area within the Draft Plan and the Plan sets out a number of principles to guide the future development of the site. Central amongst these principles is the objective to provide for a range and mix of uses on the subject lands:

The development of a high quality mixed use quarter comprising of quality new homes supported by a complimentary range of mixed commercial, community and recreational facilities will be promoted for this site.

The proposed development of the subject site for mixed use development to include neighbourhood retail provision is appropriate in terms of scale and character and will contribution to the overall mix of uses to be provided within O' Devaney Gardens. The Retail Planning Strategy for the GDA outlines the importance of providing appropriately located retail floorspace in order to ensure the needs of existing and expanding populations are locally met.

In this regard the proposed development accords with the Retail Planning Guidelines for the Greater Dublin Area, the Retail Planning Guidelines for Local Authorities, 2005-2011 Dublin City Development Plan and 2011-2017 Draft City Development Plan.

(b) "Will it cause an adverse impact on one or more town centres, either singly or cumulatively with recent developments or other outstanding planning permissions, sufficient to undermine the quality of the centre or its role in the economic and social life of the community?"

The proposed development has a net retail area of 1,316 sq. m. The qualitative and quantitative sections of this assessment have concluded that there is more than sufficient capacity for this floorspace in addition to the existing and proposed floorspace. This study has examined extant planning permissions and concluded that there is a need for the proposed development. Notwithstanding the additional floorspace which will be trading in the design year, the proposed development will not generate any significant impacts.

(c) "Will it diminish the range of activities and services that a town centre can support?"

The proposed development is of a neighbourhood scale and is in line with the objective of Draft City Development Plan to provide for a "*high quality mixed use quarter comprising of quality new homes supported by a complimentary range of mixed commercial, community and recreational facilities"* on the site. It will help ensure a sustainable retail hierarchy by providing an appropriate level of neighbourhood retail facilities for the existing and proposed residential population of the area. Having regard to the available expenditure in growth and population and in retail expenditure generally the development will not adversely affect the existing retail shopping outlets in a significant adverse way.

(d) "Will it cause an increase in the number of vacant properties in the primary retail area?"

The qualitative assessment of this report clearly shows that existing centres within the study are trading healthily. Given the levels of available expenditure growth and the limited scale of the proposed development it is considered that the proposed development will not cause an increase in the number of vacant properties in the local centres within the study area or any town or district centre outside the catchment area.

(e) "Will it ensure a high standard of access both for public transport, foot and private car so that the proposal is easily accessible by all sections of society?"

The subject sites' location in proximity to the city centre ensures that the primary means of travel will be by sustainable means such as walking and cycling. The proposed development, which is located to the west of Dublin City Centre, is convenient to an efficient public transport service and facilities are also provided for cyclists and pedestrians in this area, providing a genuine alternative to car borne journeys, especially during peak periods.

(f) "Will it link effectively with an existing town centre so that there is likely to be a commercial synergy?"

The site of O' Devaney Gardens is closely linked with Stoneybatter. In the creation of a new high quality sustainable neighbourhood on the site of O' Devaney Gardens, there is an opportunity to strengthen the synergies between the site and Stoneybatter which functions as a village centre servicing the residential community around it. New uses proposed as part of the regeneration will compliment the functions of Stoneybatter as a service centre.

The regeneration of O' Devaney Gardens will provide a catalyst for regeneration in Stoneybatter. The results of the household survey further determines the support for the proposed Phase 1B neighbourhood centre facilities from respondents from the O' Devaney Gardens Environs area. While none of the respondents from this area currently use the existing grocery shop within the complex for top up shopping they do recognise this as being a convenient location. The incorporation of the proposed neighbourhood centre within Phase 1B will therefore assist in ensuring greater integration of the O' Devaney gardens development with the surrounding area.