

**DRAFT MEATH COUNTY DEVELOPMENT PLAN 2020-2026**

# MEATH

## RETAIL STRATEGY

2020 – 2026



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## 1.0 Introduction

### 1.1 Function of the Updated Meath Retail Strategy

This retail strategy has been prepared by Future Analytics Consulting Ltd. on behalf of Meath County Council in accordance with provisions set out in the 'Retail Planning Guidelines for Planning Authorities' published by the Department of the Environment, Heritage and Local Government (DoEHLG) in 2012.

The overriding aim of the strategy is to create the appropriate conditions necessary to foster a healthy and vibrant retail environment in County Meath over the Development Plan period of 2020-2026 and beyond. It does so through retail policy recommendations which are framed in the context of national and regional plans, strategies and guidelines. The strategy provides important information on the quantum, scale and types of retail development required over the period to 2026, with a further outlook to 2031.

### 1.2 Approach

The County's previous Retail Strategy 2013-2019 was prepared during a time when the national retail market was experiencing a significant decline due to the recession and national economic downturn. During the period of preparation of this strategy, it is clear that the retail market is showing signs of improvement with marked increases in the volume of recorded sales. This optimism is tempered with caution, however with uncertainty in all market sectors derived from geo-political events and a sustained period of 'price conscious shopping' still present since the recession period. In addition, high main street vacancy rates and the growth of online shopping is a feature that continues to be apparent in the retail market.

The applied methodology for this strategy considers these aspects in detail. A key intention of the strategy is to produce a succinct and readable strategy document. The key objectives of this retail strategy are as follows:

- Establish the context in which the retail sector in County Meath operates;
- Define the retail hierarchy in the County and related retail core boundaries;
- Undertake a health check appraisal of the key retail centres in County Meath;
- Identify the broad requirement for additional retail floor space development in the County over the plan period, to support the established settlement hierarchy; and
- Provide guidance on policy recommendations and criteria for the future assessment of retail development proposals over the Development Plan Period 2020-2026.

## 2.0 National, Regional and Local Policy Context

The aim of this section is to provide an outline summary of the main policy documents that will shape the development of the Meath Retail Strategy. It is necessary to have consideration for established development trends via overarching regional and national strategies, and to incorporate them into this policy document. This ensures that a balanced and comprehensive approach is undertaken to retail development in Meath, thus into consideration external influences and other economic sectors. The following are some of the key documents to be reviewed that are relevant to the development of a Retail Strategy for Meath:

National	- National Planning Framework 2017- 2040 - Retail Planning Guidelines (2012)
Regional	-Regional Spatial and Economic Strategy 2019 - Greater Dublin Area Retail Strategy 2008-2016 - Greater Dublin Area Transport Strategy 2016-2035
Local	- Meath County Development Plan 2013-2019 - Meath Retail Strategy 2013-2019 - Local Area Plans for urban settlements (various)

### 2.1 National Policy Context

The following section outlines the primary national policy that guides retail planning in Ireland. It includes the over-arching State plans and strategies as well as retail-specific guidelines. Analysis of the implications for County Meath of these policies is included.

#### 2.1.1 National Planning Framework 2018-2040

The National Planning Framework (NPF) entitled *Ireland 2040 – Our Plan* was adopted in May 2018. The purpose of the NPF is to provide a strategic vision for the country. The NPF is the primary planning strategy for Ireland.

National Policy Objective 7 in the NPF sets out the approach to urban development nationwide. This includes:

- Encouraging population growth in strong employment and service centres of all sizes.
- Reversing the stagnation or decline of smaller urban centres, by identifying and establishing new roles and functions and enhancement of local infrastructure and amenities.
- Addressing the legacy of rapid unplanned growth, by facilitating amenities and services catch-up, jobs and/or improved sustainable transport links to cities, together with a slower rate of population growth in recently expanded commuter settlements.
- Supporting a continuation of balanced population and employment growth in self-contained settlements.

There will also be a focus on the creation of more compact forms of development that will be delivered through the regeneration of brownfield sites, infill development, and bringing vacant properties back into use.

### 2.1.2 National Development Plan 2018-2040

The National Development Plan (NDP) sets out the investment priorities that will underpin the successful implementation of the NPF. The NDP is clearly aligned with the delivery of the objectives of the National Planning Framework. The NDP focuses on investment to develop a public infrastructure that facilitates priorities within communities. The NDP sets out the level of investment which will underpin the NPF and drive its implementation over the next decade. National Strategic Objective No 5 of the NDP pertains to “*A strong economy, supported by enterprise, Innovation and Skills*” sets a priority within each of the three regions for the generation of 660,000 new jobs. One of the investment Actions included in the NDP is “*Investing in Regional Growth potential*”. This Plan specifically supports the realisation of these objectives and actions through the facilitation of the identification of strategic development lands inclusive of supporting the development of the live work concept within the higher tier settlements.

### 2.1.3 Retail Planning Guidelines 2013 and Retail Design Manual 2012

In 2012, the third iteration of the *Retail Planning Guidelines* were published accompanied with the Retail Design Manual (2012) by the Department of the Environment, Community and Local Government. The Guidelines provide a framework for regional and local authorities in the preparation of policies and County Development Plans, the assessment of planning applications, and assisting developers and retailers in formulating development proposals.

The guidelines outline five key policy objectives as follows:

- *Ensure retail development is plan-led;*
- *Promotion of city/town centre vitality through a sequential approach to planning;*
- *Secure competitiveness in retail sector through the enabling of quality development in suitable locations;*
- *Facilitate the shift towards easier access to retail via public transport, cycling and walking;*  
*and*
- *Deliver quality urban design.*

The *Retail Planning Guidelines* (2012) are referenced in the *County Meath Economic Development Strategy 2014-2022*, to endorse the approach (recommended in the guidelines) of actively engaging with land owners to facilitate development of key town centres sites. The Strategy recommends that this approach is broadened to facilitate the delivery of strategic employment generating sites.

The importance of quality urban design is acknowledged in the *Retail Planning Guidelines* (2012). This is further underlined with the accompanying document, the *Retail Design Manual* (2012) which sets out key principles of urban design to help inform the framework for policies to promote quality design in development plans and local area plans. *The Design Manual for Urban Roads and Streets* (2013) provides additional design guidance for public spaces, seeking to achieve integrated street

design within urban areas which is influenced by the topography of an area with the aim to balance the needs of all users.

## 2.2 Regional Policy Context

The following section outlines the regional policies that guide retail planning in Ireland. It includes the overarching regional plans and strategies as well as those that are retail-specific. In addition, an analysis of the implications of these policies for retail planning in County Meath is included.

### 2.2.1 -Regional Spatial and Economic Strategy

This Strategic Plan (RSES) adopted in May 2019, identifies regional strengths, opportunities and pressures and provides policy responses in the form of Regional Strategic Objectives (RSO's) which follow on from the NSO's within the NPF. The RSES acknowledges that the retail sector is a significant employer and economic contributor in the Region. It also plays a key role in placemaking and creating attractive liveable environments. .

Section 6.5 of the RSES states as follows: 'The Retail Strategy for the Greater Dublin Area 2008 was prepared by the Dublin and the Mid-East Regional Authorities (now dissolved). The retail hierarchy as expressed in the GDA strategy is substantially reflected in current city and county development plans, and is presented here combined with the existing retail hierarchy in the remainder of the Region that was not included in the GDA. It is recognised that the floorspace thresholds detailed in the GDA strategy were prepared in a different economic climate and in many cases are still to be reached. In this regard, EMRA will support and drive the preparation of a new retail strategy for the Region under the requirements of the Retail Planning Guidelines for Planning Authorities 2012, or any subsequent update, to update this hierarchy and apply floorspace requirements for the Region.'

#### REGIONAL POLICY OBJECTIVES

RPO 6.10: *'EMRA will support the preparation of a Retail Strategy / Strategies for the Region in accordance with the Retail Planning Guidelines for Planning Authorities 2012, or any subsequent update, to update the retail hierarchy and apply floorspace requirements for the Region.'*

RPO 6.11: *'Future provisions of significant retail development within the Region shall be consistent with the Retail Planning Guidelines for Planning Authorities 2012, or any subsequent update, and the retail hierarchy for the Region, expressed in the RSES, until such time as this hierarchy is updated.'*

Table 6.1 of the RSES sets out the Retail Hierarchy for the Region- Meath set out below

Level 2 Major Town Centres and County Towns - Navan , Drogheda

Level 3 town and/or district centres & sub-county town centres (key service centres)-

Ashbourne, Dunshaughlin, Kells, Trim, Laytown/Bettystown.

Level 4 Neighbourhood centres, local centres, small towns and villages

Level 5 Corner shops/small villages

### 2.2.2 Retail strategy for the Greater Dublin Area 2008-2016

The key policies contained within the retail strategy are:

- *a requirement for plan-led development and retail strategies for regional and local authorities;*
- *the promotion and enhancement of pre-existing centres that encourages a wide range of services in a pleasant environment;*
- *support for the traditional town centres as places to visit with strong community and civic functions; and*
- *a focus on mixed-use as well as ensuring that existing or new developments are accessible and well served by public transport.*

### 2.2.3 Greater Dublin Area Transport Strategy 2016-2035

*The Greater Dublin Area Transport Strategy (GDATS) 2016-2035* was prepared by the National Transport Authority in 2016. The strategy provides a framework for the planning and delivery of transport infrastructure and services in the Greater Dublin Area (GDA) over the next two decades. It also provides a transport planning policy around which other agencies involved in land use planning, environmental protection, and delivery of other infrastructure such as housing, water and power, can align their investment priorities. It is, therefore, an essential component, along with investment programmes in other sectors, for the orderly development of the Greater Dublin Area to 2035.

The Strategy identifies eight corridors covering the full extent of the GDA, three of which serve County Meath. Corridors A, B and C extend to County Meath as follows:

#### **Corridor A – Drogheda – Balbriggan - Swords – Airport – North Inner City – to Dublin City Centre**

In this corridor, the GDATS states that the car mode share for all trip purposes is 72%, while the public transport mode share is 12%. Most notably, the Strategy highlights that this corridor has the highest forecast growth in transport demand up to 2025, however, there is limited scope for increases in radial road capacity along this corridor. As a result, an increase in demand is anticipated and will require to be catered for by public transport.

#### **Corridor B – Navan – Dunboyne – Blanchardstown – to Dublin City Centre**

In this corridor, the GDATS states that the car mode share for all trip purposes is 74%, while the public transport mode share is 8%. This corridor's largest urban settlements (Blanchardstown and Navan) are projected to grow significantly up to 2035. Corridor B contains two major Inter-Urban roads, the N/M2 and the N/M3. Given the limited role of rail in meeting the demand for radial-based trips within this corridor, the management of transport demand across a range of modes on these inter-urban roads will be of critical importance in catering efficiently for future demand.

#### **Corridor C – Maynooth – Leixlip – Lucan – to Dublin City Centre**

In this corridor, the GDATS states that the car mode share for all trip purposes is 72%, while the public transport mode share is 8%. It further states that 'a considerable population in Corridor C, located outside of the local catchment of the Maynooth Line and Kildare Lines, is currently served by a number of city bus services and longer distance commuter bus routes'. The Strategy goes on to indicate that given the growth in transport demand on Corridor C from outside of the M50, additional capacity will be required on radial-based public transport services operating from this area.



## 2.3 Local Policy Context

The following section outlines the primary local policy that guides retail planning in Ireland. It includes the overarching County plans and strategies as well as retail-specific guidelines and local area plans. An analysis is included of the implications of these policies for the retail sector in County Meath.

### 2.3.1 Economic Development Strategy for County Meath 2014-2022

In 2014, Meath County Council published the *Economic Development Strategy for County Meath 2014-2022*. The Strategy outlines the following five key outputs it seeks to provide:

- *An evidence-based approach to understand and transforming the economic performance of the County.*
- *Provide a roadmap for economic growth and opportunities.*
- *Merge investment opportunities with land use planning.*
- *Development of a series of key recommendations to enable the County to realise its economic potential and prosper as a distinct and diverse location to do business.*
- *Translate key messages to various audiences via a range of marketing channels and actions.*

The Strategy's objectives are heavily focussed on providing jobs, supporting indigenous businesses and creating the conditions for foreign direct investment. Figure 4 below illustrates these objectives graphically.

The Strategy goes on to provide direction on how best to develop the economy into the future, highlighting integration with land use planning and an economic strategy. It analyses the attributes of the county's primary settlements, their position in the settlement hierarchy and attributes for future growth (see Figure 3 below). As illustrated in Figure 3, Navan and Drogheda are given primacy, while Kells is highlighted as a moderate growth town with assistance by way of regional aid funding. Dunboyne and Ashbourne combined are highlighted as a secondary economic growth town with the benefit of being in the 'metropolitan area' and in proximity to a sea port and airport.

Settlement	Spatial and Economic Structuring			Access to Labour and Markets	Promoting and Supporting Business
	Economic Character Area	Economic Hierarchy	Settlement Hierarchy	Transport Corridors	Site Scoping
Navan	Central / South Meath	Primary Economic Growth Town	Large Growth Town 1	M3, Bus	IDA Presence
Drogheda	East Meath	Primary Economic Growth Town	Large Growth Town 1	M1 Economic Corridor / EO1, Rail, Bus	IDA Presence
Dunboyne / Ashbourne	Central / South Meath	Secondary Economic Growth Town	Large Growth Town II	M3, M2, Rail, Bus, Port, Airport	Metropolitan Area
Kells	North / West Meath	Secondary Economic Growth Town	Moderate Growth Town	M3, Bus	Assisted Area (regional aid)

**Figure 1: Spatial and Economic Alignment of County Meath's Economic Growth Towns (*Economic Development Strategy for County Meath 2014-2022*)**

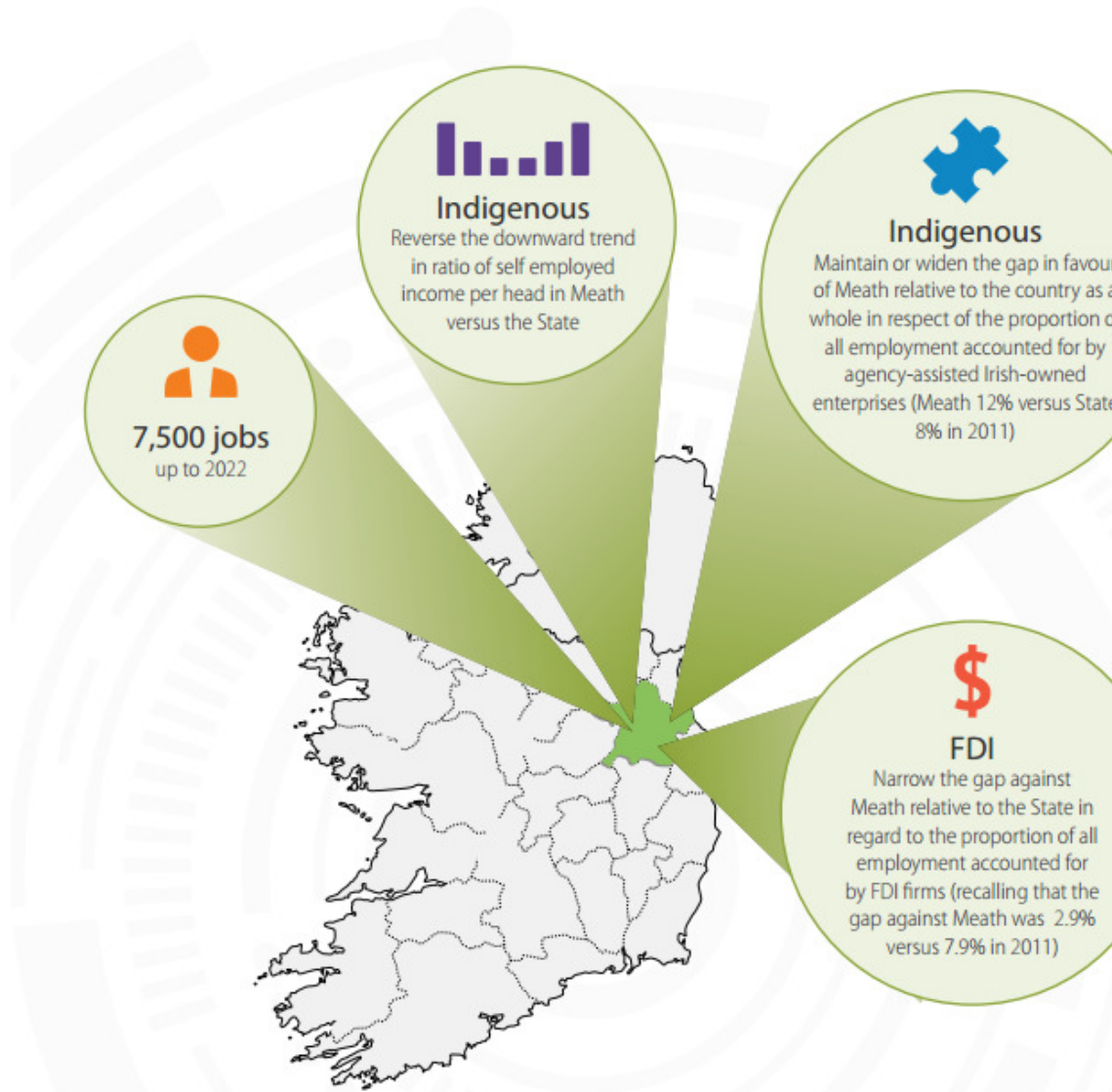


Figure 2: Job Creation Targets for County Meath (*Economic Development Strategy for County Meath 2014-2022*)

In terms of retail-specific content, the Strategy highlights retail and wholesale activity as being a 'mature' economic sector in the county. Underlining the importance of this sector for the economic development of the county, retail (and wholesale) trade is noted as being the sector that employs the most people in the county. Additionally, this sector is the second most numerous enterprise sector recorded in the county. Furthermore, the Strategy highlights employment growth sectors in the county, among which retail (and wholesale) trade has seen marked increases in numbers employed, demonstrating a growth of 8.10% between 2006 to 2011. The Strategy describes the retail and wholesaling sector as follows:

*This is a large sector employing over 270,000 people nationally. Domestic demand has been muted due to the recession. There is an opportunity to attract in multinational retailers by relaxing the retail planning guidelines but this opportunity needs to be balanced against the negative impact of out of town retailing on existing communities. Growth in this sector will be slow and steady in the medium term.*

The strategy refers to the *Retail Planning Guidelines'* approach of actively engaging with landowners to encourage development of key sites, and sets out the following 'strategic action' in relation to retailing:

*Support the retail sector in key locations so it may be in a position to fulfil its true potential and reduce retail leakage from the county.*

### 2.3.2 Meath Retail Strategy 2013-2019

The *Meath Retail Strategy 2013-2019* was prepared as part of the *Meath Development Plan 2013-2019* (Appendix 5) and is reflected in the Core Strategy of that document. This Strategy provides an update to the *Meath Retail Strategy 2013-2019*. The Strategy sets out the retail hierarchy in County Meath, identifying each centre's role within it, including a guide to the quantum, scale, location and type of retail developments required in the county. In addition, it provides a definition of the boundaries for each retail core in some of the key towns, while identifying strategies and recommendations to encourage and maintain retail in the county. However, it must be noted that the Strategy was prepared during a deep economic recession, during which the retail market had suffered a dramatic decline.

### Additional Floorspace Capacity

When determining floor space capacity and requirements the Strategy split Meath into five areas; Ashbourne, Bettystown, Kells, Navan, and Trim. Considering the economic conditions at the time of preparing the Strategy, growth rate scenarios were set as illustrated in Figure 5 below. See Chapter 6 for updated figures for additional floor space capacity for the period 2019-2025.

	Convenience sq.m.	Comparison sq.m. Scenario 1	Comparison sq.m. Scenario 2	Bulky Goods sq.m.
2011	15,431	124	124	-19,983
2019	31,071	13,723	38,527	-7,614
2022	35,617	20,368	48,446	-1,570

Figure 3: County Meath Additional Floor space Capacity (*Meath Retail Strategy 2013-2019*)

### County-Wide Objectives and Criteria

The Strategy outlines a number of policies that the Planning Authority will aim to implement in the county. They are as follows:

- *It is the policy of the Planning Authority to promote and encourage the major enhancement of retail floor space, primarily comparison goods, and town centre functions in Navan to sustain its competitiveness and importance as a Primary Growth Centre in the Greater Dublin Area;*
- *It is the policy of the Planning Authority to support the vitality and viability of existing designated centres and facilitate a competitive and healthy environment for the retailing industry into the future by ensuring that future growth in retail floor space responds to the identified retail hierarchy;*

- *It is the policy of the Planning Authority to support the development of core retail areas as identified within the County Retail Strategy and reinforce the role and function of the core retail areas;*
- *It is the policy of the Planning Authority to adhere to the provisions of the sequential approach in the consideration of retail applications located outside of core retail areas;*
- *It is the policy of the Planning Authority to have regard to the policies and objectives of the Retail Strategy for the Greater Dublin Area 2008-2016; and*
- *It is the policy of the Planning Authority to implement the policies and objectives of the Meath County Retail Strategy.*

In order to implement these policies, the following objectives are set out by the Strategy:

- *Facilitate the identification, promotion and development of key town centre opportunity sites;*
- *Promote the revitalisation of vacant and derelict properties/shop units;*
- *Encourage infill development and the redevelopment of derelict and obsolete sites;*
- *Promote ongoing environmental improvements to the public realm;*
- *Prevent overdevelopment of particular non-retail uses such as takeaways in core retail areas; and*
- *Promote activities including festivals, events and street markets in each town.*

Measures for achieving these objectives, particularly the promotion of town centres, were set out. These measures included addressing vacancy, setting up a 'town centre forum', and specific objectives for each of the settlement's town centre. See Chapter 7 of the Strategy for updated policies and criteria for assessment as well as an implementation strategy.

### 3.0 Current Retail Trends

This chapter provides an assessment of the current retail performance and trends, allowing for the consideration of national context which includes local conditions as they relate to the retail sector, comprising of comparison, convenience and bulky goods in County Meath.

The retail sector is one the primary drivers of the economy in Ireland with a presence in almost all settlements across Ireland. As a result, this makes it unique in its geographic spread. According to the Central Statistics Office (CSO), the sector employed approximately 305,000 in the provision of retail services in 2019. To highlight its significance, this sector has approximately 56,000 more employees than the combined number of employees in construction, agriculture, forestry and fishing<sup>1</sup>. The economic recovery has strengthened, the level of employment in retail services has increased steadily year-on-year since 2010 when it accounted for approximately 265,000 employees. Indeed, the worst affects of the 2008 financial crisis appear to have abated for many sectors of the economy.

#### 3.1 Retail Sales

The economic recovery has benefitted the retail sector with the Retail Sales Index having grown by 29.3% since the 'trough' of 2010.<sup>2</sup> In 2013, the CSO reported a steady increase in domestic retail sales since 2013 (see Figure 7 below). Although this is a positive indicator for the sector, it must be tempered by caution as the retail sector is highly sensitive to consumer sentiment. This means that consumer sentiment is increasingly influenced by global economic shifts and geopolitics (see Section 3.3 below). As a result, consumer sentiment affects not only the volume of sales but the financial value of those sales. Building on from this, the economic recovery in relation to the retail sector has been characterised by the 'price conscious shopper' which is evident by a proliferation in discount stores particularly in the convenience and comparison sector. As a result, this trend benefits the consumer with intense competition by placing downward pressure on prices. Nonetheless, for vendors it means that despite an upward trend in volumes of sales in recent years, these increases have not translated into an increase the value of sales.

The CSO's *Retail Sales Index* (March 2019) highlights the disparity between volume increase and value increases, showing an annual growth (March 2017 to March 2019) of 3.3% in sales by volume (see Figure 7 below), whereas only 0.8% in 'value growth' during the same period. Retail Ireland, a representative body for Irish retailers in its monthly *Retail Ireland Monitor* (May 2017) stated that out of the 32 major retail categories tracked by the CSO, 25 of these categories saw price deflation in March 2019 when compared to the same month in 2016. Retail Ireland, attributed this trend to the protracted economic downturn, describing these years as having left '*an undeniable scar on the consumer psyche*'. With Ireland's economy so heavily tied to rapidly shifting global geopolitics, consumer sentiment looks set to continue to play a significant role in the health of the retail sector in Ireland.

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<sup>1</sup> <http://www.cso.ie/en/releasesandpublications/er/qnhs/quarterlynationalhouseholdsurveyquarter12017/>

<sup>2</sup> <http://pdf.euro.savills.co.uk/ireland-research/marketinminutes-retail-q4-2016-final.pdf>

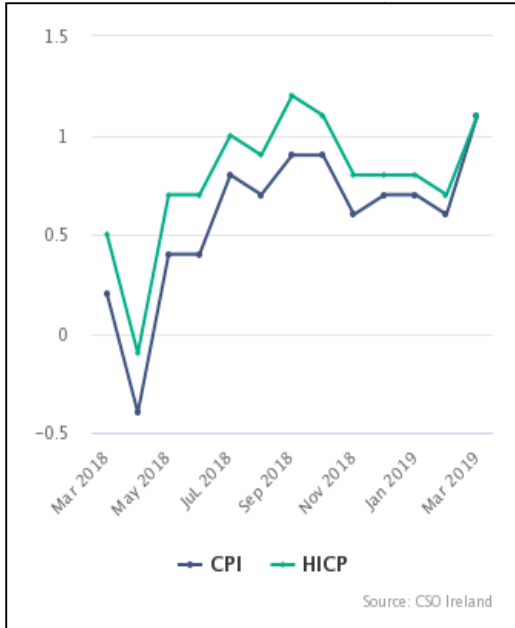


Figure 4: Consumer Price Index 2018-2019

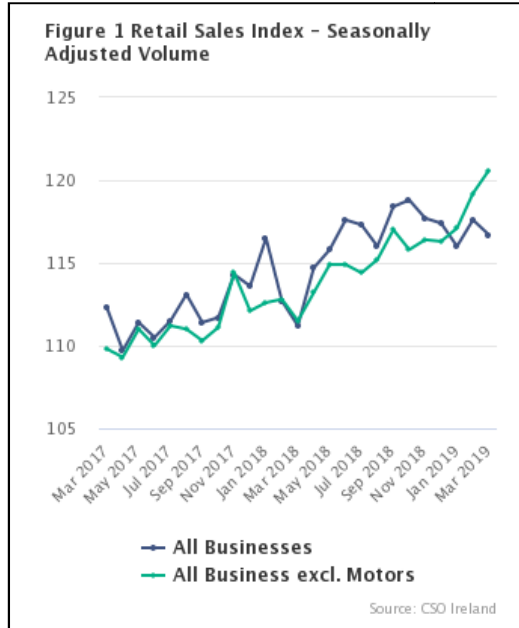


Figure 5 Retail Sales Index (Volume) 2017-2019<sup>3</sup>

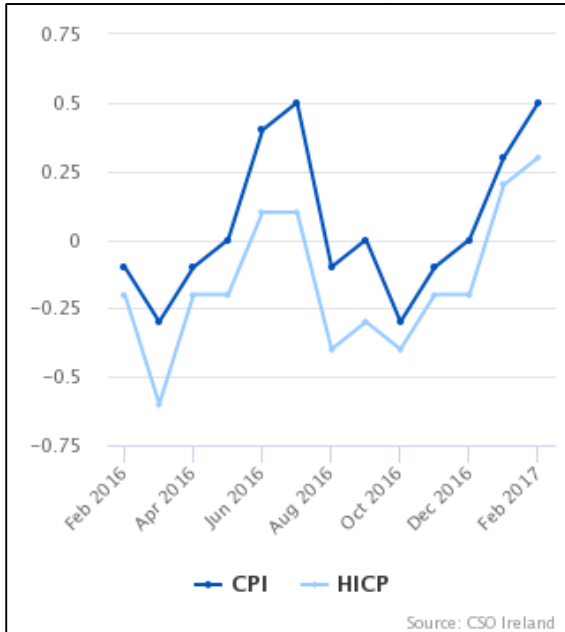


Figure 6: Consumer Price Index 2016-2017



Figure 7 Retail Sales Index (Volume) 2013-2017<sup>4</sup>

In terms of the spatial impact of these effects in County Meath and across the State, the trend toward ‘price conscious shopping’ has led to increased trip distances to large outlet stores, typically for comparison or bulky goods shopping. While increasing trip-distances is common place for comparison goods shopping, ‘price-conscious’ shopping has had the opposite effect for convenience goods with a proliferation of convenience stores locating in smaller urban centres throughout rural parts of Ireland. Therefore, resulting in shorter trip distances where previously larger urban centres such as Navan served the convenience.

<sup>3</sup> <https://www.cso.ie/en/releasesandpublications/er/rsi/retailsalesindexmarch2019/>  
<http://www.cso.ie/en/releasesandpublications/er/rsi/retailsalesindexmarch2017/>

<sup>4</sup> <http://www.cso.ie/en/releasesandpublications/er/rsi/retailsalesindexmarch2017/>

### 3.2 Geo-Political Impacts

As touched upon above, Ireland's overall economic health is increasingly subject to external forces. For instance, during a protracted period of geopolitical flux across the globe, the weakening of the Sterling due to the UK Brexit referendum and repeated Eurozone destabilisations have impacted the value of both currencies. As we have seen in the past, the spatial implications of this economic trend can be manifested in a willingness to increase trip distances for reduced prices.

When the value of Sterling fell 23% from January to November in 2016, the Retail Ireland Monitor outlined the concerns of Irish retailers over this drop. Retail Ireland Monitor explained that 'this will mean increased competition in the Irish retail market from British based retailers, a return of cross-border shopping and an increase in online shopping with UK-based websites'.<sup>5</sup> Consequently, due to the geographical position of County Meath, and its accessibility to the border, this means that its retailers are exposed to the possibility of increased out-flows driven by a weakening Sterling.

In summary the ever-changing retail market and consumer sentiment sensitivity further demonstrates the importance of well-considered retail planning as to recognise and respond to geo-political trends. For example, the expediting of land use provision where necessary, while protecting the values associated with communities and places.

### 3.3 Online Shopping

Online shopping, or 'e-commerce' has a major presence in the Irish retail market, with most multiples having a significant online presence. E-commerce Europe estimates that 82% of Ireland's population of 15 years and older use the internet whereby 1.9 million of this population shop online, resulting in a spend of €3,143 per annum on average. This represents a total spend of €5.9bn in 2015.<sup>6</sup>

Since 2014, the Visa's Irish Consumer Spending Index recorded sales in all payment types. In April 2019, the Visa Index highlighted the contrasting fortunes of online sales versus face-to-face sales, showing the latter sales increasing +2.0% annually. This increase took place in consecutive months between October 2018 and April 2019. Online shopping continued to grow at a faster rate with spending increasing to +4.0% which incidentally was the slowest growth rate in six months. In comparison to face-to-face sales, the rate of expansion was expressed in double-digits for the sixth month running<sup>7</sup>.

In conclusion, online shopping is one of the most significant growth areas in the retail market in the past decade. While this represents an opportunity for retailers as an additional sales platform, many traditional retailers have suffered loss of sales. Therefore, online sales or 'e-commerce' represents a significant competitor to traditional retailers. In recognition of this, many retailers are adapting by

<sup>5</sup> [http://www.retailireland.ie/Sectors/RI/RI.nsf/vPages/Services\\_and\\_Information~Research\\_and\\_Data~retail-ireland-monitor---issue-8---november-2016-16-11-2016/\\$file/Retail+Ireland+Monitor+Q3++November+16.pdf](http://www.retailireland.ie/Sectors/RI/RI.nsf/vPages/Services_and_Information~Research_and_Data~retail-ireland-monitor---issue-8---november-2016-16-11-2016/$file/Retail+Ireland+Monitor+Q3++November+16.pdf)

<sup>6</sup> <https://www.ecommerce-europe.eu/research-figure/ireland/>

<sup>7</sup> <https://www.visa.ie/about-us/press-releases/irish-consumer-spending-returns-to-growth-in-march-with-plus-2-dot-7-percent-increase-year-on-year-2861721?returnUrl=/about-us/press-releases/index>

co-locating leisure uses, in particular with food and beverage, alongside retail so to provide an ‘experience’ that cannot be replicated in an online setting. For instance, on the main street where floorplates are generally not large, leisure uses such as restaurants and cafes have tended to replace vacant retail units. While online shopping is a major factor in loss of sales, there is an opportunity for town centres to provide a market place, where experience and social interaction is something that is not possible online. Therefore, town centres can regain a competitive edge over online shopping.

### 3.4 The influence of Dublin City

Despite the growth in economic activity seen nationally in recent years, a positive growth outlook is not equally evident for all sectors of the economy or geographic locations. One of the causes of this, is that Dublin City tends to be the primary focus of investment and employment. Consequently, the economy of County Meath is heavily influenced by its proximity to the Capital City as evidently marked by higher levels of economic activity in comparison to other parts of Ireland. In 2015, the CSO recorded that the average disposable income per person in County Meath was €20,086, whereas in Dublin this figure amounted to almost €23,298<sup>8</sup>. The disparity of disposable income when compared to Dublin can be attributed to a similar disparity in the growth of jobs during since the economic recession. Since 2013, despite almost 200,000 net jobs have been created nationally, much of this job growth has been focussed on Dublin City. As a result of this, Dublin City has regained over 80% of jobs lost during the economic recession, while the Mid-East region has had less than 60% of jobs regained.<sup>9</sup> It is therefore unsurprising that the *County Meath Economic Strategy 2014-2022* emphasises job creation as a primary focus.

As for the retail sector, the influence of Dublin City can be seen from the levels of retail expenditure outflow from the county into neighbouring centres such as Blanchardstown and Liffey Valley. While the County Meath retail sector has always been subject to leakage of expenditure to the city, this pattern has been exacerbated in recent years with the dominance of Dublin as an employment centre for County Meath residents. Furthermore, transport infrastructure upgrades have contributed to this pattern by improving commuting networks which in turn makes commuting easier.

### 3.5 Retail Property Investment

Property investment is a clear indicator of confidence in the retail sector. This is evident across the country with sales of retail property reaching premium prices. Savills reports state that the share of retail in property investment has been ‘steadily rising’ since 2013 and high street stores. The Savills Investment Market Annual Report highlights that shopping centres have consistently accounted for over two-thirds of total retail investment since 2012.<sup>10</sup> According to Savills research, 2016 marked a bumper year with over 86% of the €2.25 billion total turnover in the retail market being attributed to

<sup>8</sup> <http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=CIA01>

<sup>9</sup> [https://www.scsi.ie/insight/annual\\_commercial\\_property\\_review\\_2018](https://www.scsi.ie/insight/annual_commercial_property_review_2018)  
[https://www.scsi.ie/insight/annual\\_commercial\\_property\\_review\\_2018](https://www.scsi.ie/insight/annual_commercial_property_review_2018)

<sup>10</sup> <http://pdf.euro.savills.co.uk/ireland-research/market-in-minutes/investment-market-annual-report-2017.pdf>



sales of shopping centres. Most notably, was the sale of Blanchardstown and Liffey Valley Shopping Centres with the former being the most expensive sale ever at a price of €950m. However, the sales of shopping centres/retail parks were not limited to Dublin, Limerick, Kildare and Kilkenny sales totalled almost €100m.

Rest of Leinster

Retail Type	2016 Yield %	2016	2015	15/16 Change
Prime City Rents	7.7%	€310	€273	13.5%
Town High Street Rents	8.5%	€206	€193	6.7%
Shopping Centre Rents	7.5%	€265	€257	3.1%
Other Retail Rents	9.7%	€134	€121	10.7%

Forecast change in Retail Rents in 2017

Retail Type	Connacht/Ulster	Munster	Rest of Leinster
Prime City Rents	5%	1%	8%
Town High Street Rents	2%	2%	5%
Shopping Centre Rents	3%	1%	8%
Other Retail Rents	8%	0%	5%

**Figure 8: Rental Values and Forecasts as reported by the Society of Chartered Surveyors (2016)**

The Society of Chartered Surveyors Ireland documented survey data in Ireland's *Commercial Property Review 2018*<sup>11</sup>, illustrating clearly the continuing rise in values associated with retail property. This is reflected in Figure 10 by increasing rent yields from the sector.<sup>12</sup> County Meath is represented in this survey data, being considered part of the 'rest of Leinster' (outside County Dublin), which shows rents per square metre increasing in value from between 3.1% to 13.5% depending on floorspace type.

In summation, the current retail trends in County Meath are positive overall, with increases in market activity and values associated with retail property. However, these trends should be tempered with a cautionary approach that recognises the forces of economic change and the spatial implications of those changes for local communities.

## 4.0 Shopper and Household Retail Surveys

The following chapter summarises the surveys carried out as part of this strategy. Both householder telephone surveys and on-street shopper surveys were carried out across County Meath during May to July 2017.

<sup>11</sup> [https://www.scsi.ie/insight/annual\\_commercial\\_property\\_review\\_2018](https://www.scsi.ie/insight/annual_commercial_property_review_2018)

<sup>12</sup> [https://www.scsi.ie/documents/get\\_lob?id=1136&field=file](https://www.scsi.ie/documents/get_lob?id=1136&field=file)

## 4.1 Methodology

For the purposes of conducting the shopper and household surveys, County Meath was divided into five zones based on the geographic proximity of each settlement centre as follows:

- Zone 1 centres on the Northwest County Meath including Kells;
- Zone 2 centres on the County town of Navan;
- Zone 3 centres on the southwest County Meath including Trim and Enfield;
- Zone 4 centres on the Southeast County Meath including Ashbourne, Dunboyne and Dunshaughlin;
- Zone 5 centres on the East County Meath including Bettystown, Laytown and Mornington.



Figure 9: Zonal Breakdown of County Meath for the purposes of surveying

A total of 549 surveys were conducted, with 390 household (telephone) surveys and 159 shopper (on-street) surveys carried out across the county (see Table 3 below).

The locations and allocations for the telephone surveys were based on population distribution across the whole county. All settlements within each zone were surveyed in numbers that accorded with

their population relative to the rest of the county. Telephone surveys were carried out by using the Eir online phone book, which randomises the list of land line numbers within each settlement.

The locations and allocations of on-street surveys were chosen based on a combination of the population of each and the existing retail floor space identified for each settlement as identified by this strategy. Only Level 3 and above settlement types (from the Retail Settlement Hierarchy) were chosen for shopper surveys given the concentrations of retail outlets and pedestrian footfall in these settlements. Enfield was excluded given the low level of commercial outlets in the town centre.

Table 1: Survey Numbers by Zonal Breakdown

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
2011 Population		9,122	31,556	19,681	31,891	19,815
% of County Population		8.1%	28.2%	17.6%	28.5%	17.7%
No. of Telephone Surveys	390	54	126	86	195	88
No of On-street surveys	159	15	33	20	85	6
Total	549	69	159	106	280	94

Both the household survey and the shopper survey contained the same questions relating to where the respondents carry out their main food and grocery shopping, top up shopping, comparison shopping (clothes and shoes) and bulky goods (large household appliances and furniture) shopping. The surveys also contained questions regarding the respondents' satisfaction with the location they were shopping in along with the frequency of these types of shopping including online shopping.

#### 4.2 Convenience (main grocery) Shopping

To begin the surveys, respondents were asked the question, 'What town or centre would you most often do your main food and grocery shopping?'

Table 4 below lists the main town centres where respondents undertake their main food shop. The table illustrates that the majority of those residents within County Meath carry out their main food and grocery shopping within the county boundaries with 78.56% of respondents doing so.

Table 2: Locations for Convenience (main grocery) Shopping

Shopping Locations	Co. Meath (%)	Ashbourne (%)	Dunboyne (%)	Kells (%)	Navan (%)	Trim (%)	Bettystown	Ratoath (%)	Dunshaughlin (%)	Stamullen (%)	Enfield (%)
Navan	21		4	2.5	87.5	6.5					
Kells	9			95	2	2					
Trim	9		2		1	85					12.5
Dunboyne	1		10								

Dunshaughlin	2	1	2					6.5	54.5		
Ashbourne	22	88.5			1			70	27.5	14.5	
Enfield	1.5										44
Bettystown	8						50				
Clonee	3.5		31.5					3.5			
Stamullen	0.2									14.5	
Ratoath	0.8							13.5			
<b>Total within Meath</b>	<b>78.5</b>	<b>90</b>	<b>49.0</b>	<b>97.5</b>	<b>91.5</b>	<b>93.5</b>	<b>50</b>	<b>93.5</b>	<b>82</b>	<b>28.5</b>	<b>56.5</b>
Drogheda	8.5				4.5		49				
Maynooth	3		15.5		1	2					25
Kilcock	0.2										6
Dublin City Centre	1	1	6			2					
Blanchardstown	3	1	17.5		1				18		
Swords	0.5	1								14.5	
Balbriggan	1	1					1.3			43	
Castleknock	0.5		2					3.5			
Edenderry	0.2										6
Ardee	0.5				2						
Mullagh, Co. Cavan	0.2			2.5							
Johnstown Bridge	0.2										6
Dundalk	0.2	1									
Donabate	0.2					2					
Naas	0.2	1									
Dundrum	0.2		2								
Lucan	1	2.2	4								
Ongar	0.2		2								
Online	1	1	2					3.5		14.5	
<b>Total outside Meath</b>	<b>21.5</b>	<b>10</b>	<b>51</b>	<b>2.5</b>	<b>8.5</b>	<b>6.5</b>	<b>50</b>	<b>6.5</b>	<b>18</b>	<b>71.5</b>	<b>44</b>
Base No.	471	88	51	41	106	47	74	30	11	7	16

For convenience shopping, Kells retains the highest numbers of shoppers within the county with 97.56% of respondents choosing to shop in Co. Meath. On the other hand, Bettystown, , retains just 50% of respondents with the vast majority of those choosing to go to Drogheda for their main food and grocery shop. Ashbourne draws a considerable proportion of people from surrounding areas to

shop there with 88.63% of Ashbourne respondents; 70% of Ratoath respondents and 27.27% of Dunshaughlin respondents choosing to do their main food and grocery shop there.

The breakdown of results demonstrate that geographical location and proximity plays a vital role in determining the attraction of towns outside the county. For instance, Drogheda attracts a lot of respondents from the eastern areas of the county with 48.65% of respondents from Bettystown, Laytown and Mornington choosing to shop there. Additionally, on the east coast, respondents from Stamullen are drawn out of the county with people going to Balbriggan from that area. Similarly,, Blanchardstown and Maynooth draw shoppers from Dunboyne, Dunshaughlin and Enfield.

Respondents were asked how often they carry out their main food and grocery shopping. 65.83% of respondents said that they carried it out 'once a week', 19.39% responded saying 'more than once a week' and 5.95% stated 'every two weeks'. 4.03% said they carried out their main food shop 'less than once a month', 2.3% responded saying 'once a month,' with 0.96% doing it 'three times a month' and 1.54% never doing it.

Different modes of transport were used by respondents to get to the shops. 89.11% of shoppers used their car, with 8.67% walking, 1.41% taking the bus, 0.6% taking a taxi and 0.2% using a bicycle.

Respondents were asked their main reason for choosing to do their main food and grocery shopping in their local town and the vast majority with 67.84% of all respondents across the county stating it was due to proximity to their home as displayed in the table below. The second most common factor influencing their shopping location was the choice of goods on offer in those particular locations, with 13.62% of respondents giving this as their main reason.

Table 3: Reasons Given for Shopping in Local Town

Reasons	Co. Meath (%)	Ashbourne (%)	Dunboyne (%)	Kells (%)	Navan (%)	Trim (%)	Bettystown (%)	Ratoath (%)	Dunshaughlin (%)	Stamullen (%)	Enfield (%)
Close to home	68	72	48	68.5	80	74	76	32	72.5	50	53.5
Close to work	1.2		2	2.5	1	2.5				16.5	
Value for money	5.5	4	22	2.5	1	2.5	1.5	14.5			6.5
Choice of goods	13.5	14	22	5	4	9.5	12	46.5	27.5		20
Quality of goods	0.2	1.5									
Ease of parking	0.5				2						
Cheap/free parking	1		2	2.5	3						
Close to other shops	2				3		3.5	3.5			13
Good service	0.5	1.5	2	2.5							
Support local business	6.5	7.5	2	13	5	12	5			35	6.5
Other	1			2.5	1		1.5	3.5			
Base No.	426	79	50	38	99	42	58	28	11	6	15

### 4.3 Convenience (Top-Up) Shopping

Survey respondents were asked about where they carry out their top-up grocery shopping. The results indicate that nearly 93% of Meath residents undertake this activity within the county. Again, as is indicative from the table below, the majority of residents in each town or village tend to do their top-up shopping in their local and nearest convenience store.

Table 4: Locations of Convenience (Top-up) Shopping

Shopping Locations	Co. Meath (%)	Ashbourne (%)	Dunboyne (%)	Kells (%)	Navan (%)	Trim (%)	Bettystown (%)	Ratoath (%)	Dunshaughlin (%)	Stamullen (%)	Enfield (%)
Local Shop (Co. Meath)	9	1.5	4	8	26	2.5	10				
Navan	15.5		2		67.5						
Kells	9			89	2	2.5					
Trim	9.5					90.5					
Dunshaughlin	2.5		2		1			3	72.5		
Ashbourne	15.5	87						6	9		
Dunboyne	7.5		56					6			
Enfield	3.5										94
Bettystown	9						75.5				
Clonee	3		23						9		
Stamullen	0.5									43	
Ratoath	8	6						84.5	9		
<b>Total within Meath</b>	<b>92.9</b>	<b>94</b>	<b>86.5</b>	<b>97.5</b>	<b>97</b>	<b>95</b>	<b>85.7</b>	<b>100</b>	<b>100</b>	<b>43</b>	<b>94</b>
Drogheda	2.45				2		14.3			14.5	
Leixlip	0.5		4								
Balbriggan	0.2									14.5	
Kinnegad	0.2										6
Other	2.5	4.5	7.5	2.5	1	2.5					
Swords	0.5	4								14.5	
Blanchardstown	0.2					2.5					
Dublin City Centre	0.2		2								
Skerries	0.2									14.5	
<b>Total outside Meath</b>	<b>7</b>	<b>6</b>	<b>13.5</b>	<b>2.5</b>	<b>3</b>	<b>5</b>	<b>14.5</b>	<b>0</b>	<b>0</b>	<b>57</b>	<b>6</b>

Base No.	408	69	52	37	93	42	49	32	11	7	16
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Participants were asked how frequently they tend to do their top up grocery shopping. 47% responded saying that they did it 'every few days' 24% stated 'once a week', with 19% doing it 'twice a week' and 9.5% never doing it.

To do their top up grocery shopping, 73% of respondents stated that they normally use their car for top up convenience shopping while over a quarter (25%) walked. 1% took the bus, 0.5% took a taxi and 0.2% cycled.

#### 4.4 Comparison Shopping

Participants were asked which town or shopping centre they would normally or most commonly visit to buy clothes, shoes, pharmaceuticals and hardware. Nearly two-thirds of respondents (64.5%) reported that they left the county to conduct these purchases. Blanchardstown is the most popular destination outside the county with 28.8% of survey participants visiting this shopping centre. This preference was then followed by Dublin City Centre with 12.43% of respondents stating that it was their preference, while 10.85% of respondents identified Drogheda for this question. Navan was identified by 23.08% of respondents as the destination normally or most commonly visited for comparison shopping.

The majority of shoppers from Kells, Navan and Trim conducted their comparison shopping within the county while the remaining settlements had a majority of respondents who visited shopping centres, towns and outlets outside the county (see Table 7 below).

Table 5: Locations for Comparison shopping

Shopping Locations	Co. Meath (%)	Ashbourne (%)	Dunboyne (%)	Kells (%)	Navan (%)	Trim (%)	Bettystown (%)	Ratoath (%)	Dunshaughlin (%)	Stamullen (%)	Enfield (%)
Navan	23		2	53	55	41		6.5			12
Kells	2			15	2.5						
Trim	2					14.5			7.5		6
Dunshaughlin	0.5		2		1				7.5		
Ashbourne	7	27			3.5			9.5	15.5		
Dunboyne	0.2	1									
Athboy	0.2				1						
Bettystown	1						5.5				
Total within Meath	35.5	28	3.5	68	62.5	55	5.5	16	31	0	18
Drogheda	11	2	2		5.5		63			16.5	
Maynooth	1		2								29.5
Blanchardstown	29	34	66.5	13	21.5	22.5	1.5	75	61.5		6
Dublin City Centre	12.5	22	15	8.5	3.5	20	13	9.5		33.5	12
Dundrum	0.5				2.5						
Liffey Valley	2	2	5.5	2	1						23.5
Dundalk	0.2						1.5				

Northern Ireland	0.5			2			3				
Bailieborough	0.5			4							
Kildare Village	0.2										6
Cork	0.2				1						
England	0.2	1									
Balbriggan	0.2						1.5				
Abroad	0.5	1			1		3				
Mullingar	0.2					2					
Ardee	0.2				1						
Carrickmacross	0.2				1						
Swords	3.16	9			1		4.5			50	
Edenderry	0.2	1									
No place in particular	0.2								7.5		
Online	1.5		5.5	2			4.5				6
Total outside Meath (incl. online)	64.5	72	96	32	37.5	45	94.5	85	69	100	82.5
Base No.	507	97	54	47	122	49	70	32	13	6	17

Survey respondents were also asked their main reasons for shopping at the locations where they carried out their comparison shopping, shown in the figure below. The largest proportion of people (44%) chose the choice of goods as their main reason for shopping in their particular location. Behind this reason, convenience or proximity to their home was the second most popular reason with 30.02% of respondents stating this as the main reason for shopping at a particular location (see Table 8 below).

Table 6: Reasons for Shopping in Local Town

Reasons	Co. Meath (%)	Ashbourne (%)	Dunboyne (%)	Kells (%)	Navan (%)	Trim (%)	Bettystown (%)	Ratoath (%)	Dunshaughlin (%)	Stamullen (%)	Enfield (%)
Close to home	30	32.5	35	8	42	12	47.5	9.5	16.5	16.5	19
Close to work	2.5	1	2	5.5	4	2.5				33.5	
Value for money	3	1	2	8	1	2.5	7.5				6.5
Choice of goods	44	52	43	62	30	55	25.5	67.5	50	33.5	43.7
Quality of goods	2.5	3.5			1	5	2	6.5	8.5		6.5
It is close to other amenities I enjoy	1.5		2		1	5	2			16.5	
Ease of parking	0.5		2					3			
Cheap/free parking	3.5	2.5	6	2.5	5	5		3	8.5		
Close to other shops	6	1	6		7	7	11	9.5			18.5
Support local business	5	2.5	2	5.5	8	7	3.5		16.5		6.5



Good service	2	3.5		8	1		2				
Base No.	433	83	51	37	100	42	55	31	12	6	16

Survey respondents were asked how often they carry out their comparison shopping. Over half, 58% replied saying they do it 'less than once a month', 27% stated 'once a month', with 5.5% doing it 'every two weeks' and 4.5% 'once a week'. 3.5% said they carried out their comparison shopping 'three times a month' with 1.5% doing it 'more than once a week'.

Survey respondents were also asked which mode of transport they used to carry out their comparison shopping. Over four fifths (81%) of respondents stated that they normally use their car, 11.5% take the bus and 5.5% walk.

Survey respondents were also asked how satisfied they were with doing their comparison shopping in their chosen location. As shown in the table below, over 90% of Navan residents who do their comparison shopping in Navan were either satisfied or very satisfied with their experience of shopping in the town.

Of the 28.8% of survey respondents who shop in Blanchardstown, which is the most popular destination for comparison shopping either inside or outside the county, over 95% of those were either satisfied or very satisfied with their experience of shopping there.

#### 4.5 Bulky Goods Shopping

As displayed in the Table 9 below, respondents were asked to identify the location where they most often buy bulky goods. Although bulky goods are classified under the comparison goods category, for the purposes of this survey we define bulky goods as furniture or large household appliances or electrical goods. Examples of bulky goods would be fridges, washing machines, ovens and microwaves.

As was the case with comparison shopping, according to our survey, residents of Meath shop for bulky goods in greater numbers outside the county with 57.5% represented in doing so. Again, Blanchardstown is the most popular destination with 21% of all participants having stated that they carry out their bulky goods shopping at this centre. Blanchardstown is followed in preference by Drogheda at 13.92% and Dublin City Centre with nearly 7% of all survey respondents having stated that they carry out their bulky goods shopping there.

The majority of survey respondents from the Ashbourne, Dunboyne, Ratoath, Dunshaughlin, Stamullen and Bettystown-Laytown-Mornington areas stated that they conduct their bulky goods shopping outside County Meath while the majority of Navan and Kells residents, 76.92% and 67.44% respectively, stated their preference for bulky goods shopping as being Navan. Meanwhile the majority of survey respondents from Trim stated that they conduct their shopping between Navan (17.07%) and Trim (46.34%).

Table 7: Locations for Bulky Goods shopping

Shopping Locations	Co. Meath (%)	Ashbourne (%)	Dunboyne (%)	Kells (%)	Navan (%)	Trim (%)	Bettystown (%)	Ratoath (%)	Dunshaughlin (%)	Stamullen (%)	Enfield (%)
Navan	32	2.5	19.5	67.5	77	17		17	22		19
Kells	1			11.5							
Trim	5.5				1	46.5					19
Ashbourne	3.5	15			1			3.5			
Dunboyne	0.2	1.25									
Enfield	0.5										18.5
<b>Total within Meath</b>	<b>42.5</b>	<b>19</b>	<b>19.5</b>	<b>79</b>	<b>79</b>	<b>63.5</b>	<b>0</b>	<b>20.5</b>	<b>22</b>	<b>0</b>	<b>56</b>
Drogheda	14	1.5	2		11.5		75			43	
Blanchardstown	21	26	53	4.5	5	22	3.5	65.5	78		12.5
Dublin City Centre	7	17.5	8.5	2.5	1	7.5	9	3.5			6.5
IKEA	4.5	15	4.5	2.5	2		2			14.5	
Dundrum	0.2						2				
Airside	1	4				5					
Charlestown, Finglas	0.5	2.5						3.5			
Newbridge	0.2										6.5
Liffey Valley	0.5		2			2.5					6.5
Mullingar	0.2										6.5
Dundalk	0.2	1.5									
Naas	0.2	1.5									
Bailieborough	0.2			2.5							
Swords	2.5	7.5					3.5			28.5	
Carrickmines	0.2		2								
Ongar	0.2		2								
Lucan	0.2	1.5									
Coolock	0.2	1.5									
Northern Ireland	0.5	1.5		2.5							
No place in particular	0.7		2		1			3.5			
Online	3	1.5	4.5	7	1		3.5	3.5		14.5	6.5
<b>Total outside Meath (incl.)</b>	<b>57.5</b>	<b>81</b>	<b>80.5</b>	<b>20</b>	<b>21</b>	<b>36.5</b>	<b>100</b>	<b>79.5</b>	<b>78</b>	<b>100</b>	<b>44</b>

<i>online)</i>											
Base No.	431	80	46	43	104	41	56	29	9	7	16

Survey respondents were also asked their main reasons for shopping at the locations where they carried out their bulky goods shopping. As was the case for regular comparison shopping, choice of goods or shops is the most popular determining factor when it comes to choosing where to go to buy bulky goods. For choice of bulky goods, 37.31% of respondents reported this as their main reason. In a close second in terms of preference, 32.64% of survey respondents stated that proximity to their home was the main determining factor for choice of location for bulky goods shopping (see Table 9 below).

Table 8: Locations for Bulky Goods Shopping

Reasons	Co. Meath (%)	Ashbourne (%)	Dunboyne (%)	Kells (%)	Navan (%)	Trim (%)	Bettystown (%)	Ratoath (%)	Dunshaughlin (%)	Stamullen (%)	Enfield (%)
Close to home	32.5	17	31	5.5	45.5	27.0	60.5	20	22	50	40
Close to work	1.				2	2.5				16.5	
Value for money	6	10	6.5	5.5	4.5	2.5	8.5	4			13.5
Choice of goods	37.5	55	44.5	66.5	19	29.5	16.5	56	78	16.5	13.5
Quality of goods	3.5	7	2		3	5.5	2	4			
It is close to other amenities I enjoy	0.5				1					16.5	
Ease of parking	1.5				1	5.5	2	4			
Cheap/free parking	1.5	3	2		1			4			
Close to other shops	3	3	2		1	2.5	6.5	4			20
Support local business	8.5	3	4.5	3	18	24.5	4				
Online purchasing is better value	0.2		2								
Online deliveries save me time	0.5		2	3							
Good service	1	1.5	2	3	1						
Other	3	1.5		14	2			4			13.5
<b>Total</b>	<b>386</b>	<b>71</b>	<b>45</b>	<b>36</b>	<b>94</b>	<b>37</b>	<b>48</b>	<b>25</b>	<b>9</b>	<b>6</b>	<b>15</b>

In terms of frequency of bulky goods shopping, 63.45% carried out this shopping only ‘when required’, with 18.74% doing it ‘once or twice a year’. 9.65% of survey respondents never go bulky goods shopping while 5.57% of respondents shop for bulky goods ‘several times a year’ and 2.6% stated they did it ‘once a month’.

Unsurprisingly, the most popular mode of transport used to go bulky goods shopping was the car, with 86% choosing this. This was followed by the bus, with 8.5% of survey participants saying they took this mode of transport and 5% stating a preference to walk.

#### 4.6 Leakage to Competing Centres

As can be seen from Tables 4, 6, 7 & 9 above, leakage of expenditure outside of County Meath is a significant factor in the county’s retail sector, particularly for comparison goods and bulky goods shopping. Table 10 below summarises the results of the survey in relation to retail expenditure leakage.

Table 9: Overview of Retail Leakage from County Meath by Retail Category

Retail type	Convenience (main grocery)	Convenience (top up)	Comparison goods	Bulky goods
% of survey respondents who normally shop outside Co. Meath	21.5%	7%	64.5%	57.5%

Table 11 below shows that the majority of respondents to the survey who exit the county to do their comparison shopping will primarily visit Blanchardstown, Drogheda, Dublin City Centre, Liffey Valley and Swords.

Table 10: Retail leakage by Category and Location of Expenditure

Area	Nature of Visits to Competing Centres					
	Food and Grocery		Clothes and Footwear		Bulky Household Goods	
Blanchardstown	13	5.2%	146	58.4%	91	36.4%
Drogheda	41	26.28%	55	35%	60	38.46%
Dublin City Centre	5	5.1%	63	64.29%	30	30.61%
Liffey Valley			11	78.57%	3	21.43%
Balbriggan	5	83.33%	1	16.67%		
Swords	2	7.14%	16	57.14%	10	35.71%
Dundrum	1	20%	3	60%	1	20%
IKEA					19	100%
Airside					5	100%
Elsewhere in Dublin	8	53.33%			7	46.67%
Maynooth	14	70%	6	30%		

Naas	1	50%			1	50%
Elsewhere in Kildare	2	50%	1	25%	1	25%
Dundalk	1	33.33%	1	33.33%	1	33.33%
Ardee	2	66.67%	1	33.33%		
Elsewhere in Ireland	2	20%	6	60%	2	20%
Northern Ireland			3	60%	2	40%
Abroad			5	100%		

## 5.0 Health Check Analysis

This chapter provides a detailed analysis of each of the ten main settlements in County Meath as identified by the retail hierarchy. These settlements are Navan, Trim, Kells, Ashbourne, Dunboyne, Dunshaughlin, Enfield, Laytown/ Bettystown, Ratoath and Stamullen. By utilising both qualitative and quantitative methods, the health checks provide a useful insight into each of the settlements' town centres with a specific focus on retail performance and potential. The analysis identifies key actions tailored to support each settlement which includes identifying potential development sites. As prescribed by the *Retail Planning Guidelines (2012)*, the health checks use the following indicators of viability and vitality in addition to recommendations for action, with the aim to improve or maintain the health of each town.

- Attractions;
- Accessibility;
- Environmental Quality and Amenity;
- Diversity of Uses;
- Multiple Representation;
- Levels of Vacancy.

As part of this Strategy, the land use surveys of town centre units have been carried out to analyse indicators such as diversity of uses, multiples representation and levels of vacancy. The extent of the study area for each land use survey are shown in the vacancy maps for each health check. The figures and percentages given to the share of land uses (including vacancy) are indicative of the following uses in each town centre:

Retail (except for warehousing and motor sales);  
 Transportation and storage;  
 Accommodation and food service;  
 Information and communication;  
 Financial and insurance;  
 Real estate;  
 Professional, scientific and technical;  
 Administrative and support service;  
 Public administration, defence, compulsory social security;  
 Education;  
 Human health and social work;  
 Arts, entertainment and recreation;  
 Other service activities;

Vacant units.

## 5.1 Navan

Navan is the administrative centre of County Meath and by some distance the largest town in the County. The town has a population of 30,173 residents (Census 2016), having grown in population by over 1,600 residents since 2011.

### Attractions

As an attractor of retail activity, Navan has several advantages. The town has a large catchment area with Trim and Kells being the closest centres within a distance of 14 and 16 kilometres, neither of which contain the scale of population or retail offering that Navan provides. Therefore, Navan serves a wide catchment area with a dispersed population to provide its convenience, comparison and bulky goods retail needs.

The traditional main streets of Trimgate Street, Watergate Street and Ludlow Street offer a variety of commercial types including notable retailers such as Cordners Shoes, Geoghan's Department Store and Tierneys Newsagents, which have a prominent presence in the town for many decades. The main streets' retail provision is complimented by cafes, a number of public houses, and restaurants such as Room 8, Luvida and Crave. New and modern café's at Watergate Street and the Old Cornmarket provide alternatives to traditional offerings.



Figure 10: Trimgate Street Retail Shopping<sup>13</sup>

In recent years, Navan Shopping Centre on Kennedy Road has provided significant competition to the main street with Dunnes Stores, Tesco and Penneys acting as anchors in the town. In 2009, Navan Shopping Centre was supplemented by the adjoining development of Marks and Spencer and Easons. The Kennedy Road retail provision is complimented by restaurants and cafes such as Costa Coffee, O'Briens Sandwich Bar, and Simply Honest Foodhall.

The Newgrange and Ardboyne Hotels have for some decades provided the primary accommodation for visitors to Navan, both of which also provide popular dining and entertainment events to locals and visitors alike. Solstice Arts Centre, located near the municipal civic offices also showcases local talent and renowned artists, attracting visitors to the town. Athlumney Castle, a fortified Tower House dating from the 15<sup>th</sup> Century while not in the town centre, is located close to town across the Boyne River. This, along with the green infrastructure of the Boyne Ramparts Heritage walk and the Blackwater Park provides the town with natural and historic amenity. Other attractions such as Pairc Tailteann Gaelic Grounds, Navan Racecourse, and Navan Rugby Club regularly attract large numbers of visitors from the rest of the county, supplementing patron numbers in the town.

<sup>13</sup> [cc-by-sa/2.0](https://creativecommons.org/licenses/by-sa/2.0/) - © James Allan - [geograph.org.uk/p/2644610](https://geograph.org.uk/p/2644610)



Figure 11: Navan Shopping Centre's Kennedy Road frontage

Both the Navan Public Realm Study *Navan Town Centre – Enhancing our Town* (2016) and the *Integrated Public Realm and Movement Plan Navan 2030* (2017) proposes ambitious yet significant enhancements to the public realm of Navan Town Centre. Figure 12 below shows an analysis of the use and function of Navan from this plan (2017) which highlights the retail/ commercial core to the north and cultural core the south with the historic streets of Trimgate Street and Market Square separating both cores.

### Accessibility

As mentioned previously, Navan is a well-connected town by road namely, the M3 Motorway and benefits from the M3 Parkway Train Station which includes a park and ride facility located at North Dunboyne. In addition, Navan is connected by the N51 national secondary road to Drogheda to the east which also extends west towards Mullingar and the M4 road network. Moreover, both private and public bus services have increased in frequency and efficiency in recent years, thus offering additional regional bus services. The Public Realm plans referred to above, propose to relocate the bus terminal from Railway Street to the Civic Square at Kennedy Road, with the aim to provide a more central connection for existing and future routes. This proposal will not just benefit visitors but provide synergy benefits for adjacent retail operators.

For many years Navan has suffered from traffic congestion, particularly along Trimgate Street and Kennedy Road. In response to this, Navan's Public Realm Plans propose to reduce the negative impact of vehicle congestion in the town centre as well as on-street car parking. *Navan Town Centre – Enhancing our Town* (2016) states that:



*Walking and cycling will be prioritised. Traffic access will be optimised, with through-traffic reduced, promoting improved public transport network.<sup>14</sup>*



Figure 12: Navan 2030 Town Centre Overview

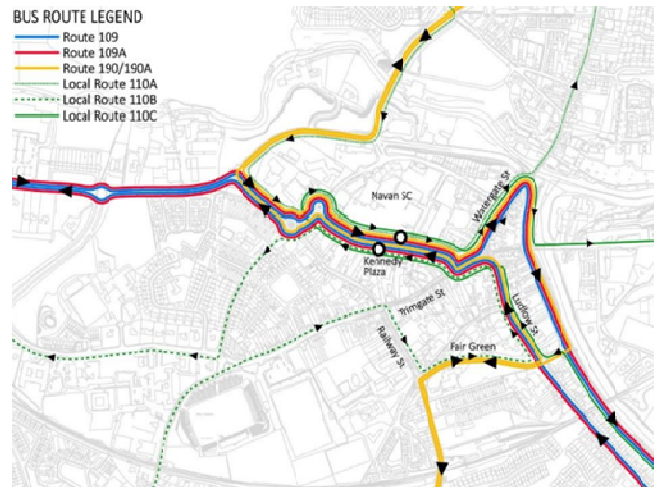


Figure 13 Navan 2030 Future Bus Network

Navan contains a significant quantum of car parking, which it currently relies upon with limited regional (other than Dublin bound) and local buses. The Civic Plaza at Kennedy Road offers car parking at an hourly rate of €1.40 while the Navan Shopping Centre's upper floor car parking is charged at €1.20 per hour. Other civic car parks include Abbey Road Car Park, Foresters Car Park and the Fairgreen Car Park, which all charge €1.20 per hour. The Town's main streets provide on-street car parking at €1 per hour. Whereas All Day Parking exists at a rate of €2.40, provided by Ramparts Car Park and O'Mahonys Car Park.

On-street car parking has in recent years been reduced due to widening of footpaths to facilitate the needs of pedestrians as in the case of Watergate Street and Market Square. The aforementioned Public Realm documents envisage optimisation of on-street car parking, as well as increased use of local bus services (see Figure 15 above) with the aim to improve accessibility for all users.

### Environmental Quality and Amenity

Navan's geographical position at the confluence of the Rivers Boyne and Blackwater provides the town with a unique natural asset, which promotes environmental quality and amenity. While the Kells Road isolates the town centre from the river corridor, the river corridor includes zoned open space to the south and north of the waterway including the Boyne Ramparts Heritage Walk. A total of 11% of the zoned land is provided for open space within the Navan Town Legal Boundaries. Despite this, the town centre lacks open space and in particular 'green infrastructure' with very few grassed parks or trees in the central area (see Figure 14 below).

Navan has been subject of significant investment in the public realm in recent decades with a focus on improving the pedestrian environment and addressing traffic congestion in the town centre.

<sup>14</sup> <http://www.meath.ie/CountyCouncil/Planning/Part8s/>

Widening and resurfacing of footpaths at Market Square and Watergate Street have improved the safety and accessibility of the historic main streets. A new focus on the laneways connecting to the Kennedy Road Civic Plaza has improved permeability as evidenced by the upgrading of Metges Lane and Preston Place. Both lanes contain seating areas. Overlooking the Civic Plaza in the east, a low walled area with trees and a statue provides pedestrian amenity. While these spaces are important in providing resting space for users of the town, their maintenance and quality are equally important to allow users to feel safe and comfortable within them. Most notably from visual inspections that the cleaning of these spaces could be improved.



Figure 14: Environmental Quality and Amenity Indicators for Navan

Notwithstanding the environmental and amenity benefits that these areas provide to pedestrians in the town, there is an overall shortfall in high quality spaces for users of the town centre. This appears to be a particular focus area of Meath County Council, however which has obtained 'Part 8' planning permission (P8/17004) for a series of town centre improvements, many of which are expressed through the public realm plans referred to above. The works (commenced April 2019) will be completed on a phased basis over the next couple of years and include:

*The upgrade of Market Square, Kennedy Plaza, Fair Green, various streets, roads and laneways, the set-back of bus stops (both directions) on Kennedy Road, new taxi ranks on Kennedy Road and Abbey Road, enhanced pedestrian and cyclist facilities, a bus terminus/park and ride to the north of Navan on the R147 and other ancillary works. Traffic management measures to be implemented include Railway Street traffic flow becoming two-*

way, traffic flow on Ludlow Street being reversed, a bus gate at Market Square, the closure to through traffic on Old Cornmarket and through traffic re-routed around the town centre.<sup>15</sup>

In addition to this, Meath County Council have recently opened a separate cantilevered pedestrian and cycle path to the south of the Athlumney Road Bridge. Works were completed in November 2018 and it is hoped that this development will increase accessibility to the amenities to the east of Navan including the River Boyne corridor and Athlumney Castle, and improve the overall environmental quality and amenity of Navan Town Centre.



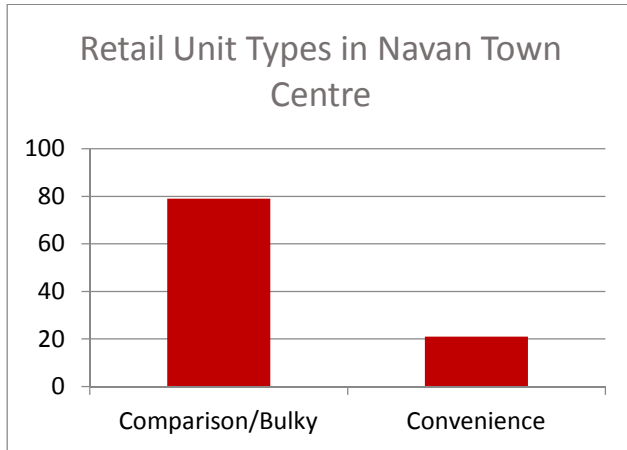
Figure 15: Preston Lane seating area and Civic Square car parking

### Diversity of Uses & Multiples Representation

The land use survey of town centre units for this strategy indicates that Navan Town Centre has a relatively diverse mix of uses. Retail is the most frequent use (by unit) occupying 24% of all uses surveyed with 19% being comparison goods units (79% of retail floorspace) and 5% being convenience goods units (21% of retail floorspace). Leisure uses such as accommodation, food and beverage service tend to complement this retail activity. 11% of all units surveyed are occupied by leisure uses – a relatively low provision to serve such a large retail offer.

Table 11: Retail Unit Types in Navan Town Centre

<sup>15</sup> <http://www.meath.ie/CountyCouncil/Planning/Part8s/>



### Levels of Vacancy

Navan’s town centre contains a total of 12 vacant units. When combined with those units included in the above land use and vacancy map, this equates to a vacancy rate of 8.4% for its town centre. While lower levels of vacancy exist between Trimgate Street and Canon Row, as well as the Kennedy Road Civic Plaza (including Navan Shopping Centre), all other main streets show concentrations of vacancies (see Figure 16 below). Opportunities also exist to activate Navan Shopping Centre’s Kennedy Road frontage by creating retail frontages, which are presently used to advertise occupants within the shopping centre (see Figure 11 above).

It is widely accepted that environmental and pedestrian amenity improvements to the public realm significantly improve the viability of adjacent retail units. Vacant units exist within the pedestrian through-way on Metges Lane. This example presents a particular opportunity for the historic main street to connect with the modern retail areas to the east. This has occurred more successfully at Preston Place where only one vacant unit exists. Similarly, a large vacant site at the old Cornmarket has great potential to be a pleasant pedestrian street and link to southern parts of the town centre. In addition, the adaptive reuse of the Meath Chronicle Building fronting Watergate Street should be sought as a priority, given its prominent location and heritage value.

The land use survey for this strategy did not account for out of town retail units; however it is notable that in June 2019 the Navan Retail Park contained only one vacant unit, while the Blackwater Retail Park had just two vacant units.



Figure 16: Vacant Addresses in Navan Town Centre

### Key Actions and Recommendations for Navan

It is clear after undertaking the Navan Town Centre Health Check that Navan is a vibrant and successful town centre, which serves the county well. However, a number of areas of improvement have emerged from this analysis, namely the environmental quality and amenity of the town centre, activation of key frontages, and the provision of complementary uses such as food and entertainment options..

Section 6.0 of this Strategy provides a guide to the quantum of additional floor space potential envisaged for Navan during the lifetime of the county development plan. Section 7.2 of this Strategy identifies retail opportunity sites and the core retail area for Navan.

It is noted that many of the proposals contained in the public realm plans referred to above, if implemented will significantly improve the town centre's environmental quality and amenity. In addition, the following key actions are considered important in maintaining the future health of Navan's town centre.

- Activating Navan Shopping Centre frontages to Kennedy Road;
- A focus on activating laneways such as Metges Lane and the Old Cornmarket;

- Proactively engaging landowners to develop key vacant sites including 'retail opportunity sites' identified in Section 8.2.1;
- Focus on consolidating the existing town centre and retail core;
- Improving the environmental quality and amenity in the town centre by providing additional green infrastructure and public resting spaces;
- Enhancing the connection with the River Boyne frontage;
- Improving the 'Civic' function of the Kennedy Road Civic Plaza including a reduction in the level of on-street car parking currently provided;
- A focus on maintenance and cleaning of public spaces to the highest standard to improve the experience of town centre user;

## 5.2 Trim

In 2016, the CSO recorded Trim Town's population as 9,194 classifying it as the fourth most populated town in County Meath. Given that it is the largest town in the southwest of the county, Trim serves a large catchment area.

### Attractions

Trim Castle is located directly adjacent to the town's retail core and plays a major role in attracting visitors to the town. In 2000, the castle underwent extensive restoration at a cost of €3m. To support this, a number of hotels, restaurants and retail provisions have been developed in the town. As a result, this commercial activity supplements Trim's role as a service town for residents in the southwest of the county.

Trim is a designated heritage town and tourism is the primary attractor and economic driver for the town. Tourists are served by a dedicated visitor centre and tourist office as Trim Town Hall, Castle Street, which hosts a multimedia exhibition. In addition, Trim Castle is complemented by other historical attractions such as St Patrick's Cathedral, St Mary's Abbey, the Yellow Steeple as well as historical connections to Jonathan Swift and the Duke of Wellington. The town itself is attractive with the built heritage providing visual interest and the public realm being well-maintained. Moreover, the River Boyne offers significant blue and green infrastructure and provides nature-based tourism.

Driven by tourism, recent investment has precipitated a new wave of modern development to the town. The Trim Castle Hotel on Castle Street and Finnegans Way is an example of this. Mixed use developments along Finnegans Way have added to the retail offer in the town centre with the hotel itself incorporating a Kilkenny Design retail unit and further west along Finnegans Way, a bridal shop, grocery shop, pharmacy and restaurant add vibrancy to this developing street.

The Office of Public Works headquarters was one of the only state government departments that was successfully 'de-centralised' from Dublin City. More importantly, the function of the office complements the historic nature of the town and acts as a key employment generator.



Figure 17: Trim Castle<sup>16</sup>

Traditionally, Market Street and Emmett Street have been the primary focus of retail activity in Trim by hosting a mix of small scale convenience and comparison uses. However, in recent years, the town's retail offer has been supplemented by the development of Supervalu and Lidl convenience stores to the north of the town centre. An ALDI convenience store opened in November 2017 to the west of Watergate Street, providing 1,254 sq.m. (net) of additional retail floorspace to Trim. Overall retail provision in Trim has been estimated at 31,610 sq.m. by this Strategy.

### Accessibility

Trim is accessed by road via the R154 and R161 roads, approximately 15km from the M3 Motorway and 22km from the M4 Motorway. By vehicle Trim is approximately 46km from Dublin City Centre and is well-connected by regular private and public bus services. However, public buses to Navan, Kells and Dunshaughlin are less frequent.

There is good provision of public car parking with car parking facilities located at French's Lane, Finnegan's Way and Summerhill Road at a cost of €1 per hour, with all day for short stay spaces at €3, or €2 for all day long stay spaces.

A compact urban form with relatively low levels of vehicle traffic means the town is highly walkable. Investment in the public realm including footpaths, particularly at Castle Street and Market Street has improved the usability of the town for pedestrians and shoppers. It is noted that opportunities exist to create north-south pedestrian movement from Finnegan's Way through the Market Street, which would allow for greater levels of footfall for both areas.

<sup>16</sup> [https://upload.wikimedia.org/wikipedia/commons/5/5f/Trim\\_Castle\\_%281130268262%29.jpg](https://upload.wikimedia.org/wikipedia/commons/5/5f/Trim_Castle_%281130268262%29.jpg)

## Environmental Quality and Amenity

Trim's compact urban form is complemented by access to high quality open spaces within the town centre, which are predominately linked to Trim Castle demesne and the River Boyne Corridor. These natural and built heritage assets add significant value to these open spaces. Of the total extent of Trim's zoned land, 21% is zoned F1/G1/H1 ('green'/ recreation/ amenity). The combination of high levels of open spaces located close to the town centre's most important attractions, and the high-quality streetscape makes Trim as a town with a high level of environmental quality and amenity.

The environs of the castle have been subject to significant upgrading in recent years with the construction of the Courthouse extension and associated footpath works, as well as Trim Castle Hotel. This area caters directly to visitors, and contains interpretative signage, mapping as well as public toilets. As Trim continues to grow as a tourist attractor, it is important that a focus remains on improving the public realm and the 'experience' of the visitor. Opportunities exist to improve the pedestrian environment, particularly on Market Street in the western parts of this street where there are high levels of footfall attracted to key buildings such as the post office and financial institutions concentrated at the crossroads of Watergate Street.



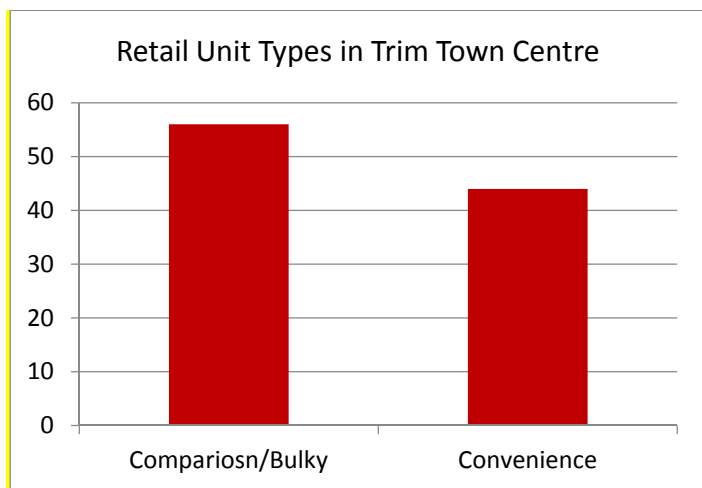
Figure 18: Environmental Quality and Amenity Indicators for Trim



### Diversity of Uses and Multiple Representation

Trim Town Centre contains a mix of uses that are typical of a rural service town of its scale. The retail sector occupies 32.2% of the town’s units with 18% being comparison or bulky goods uses (56% of retail floorspace) and 14.2% convenience uses (44% of retail floorspace). Accommodation and food service uses tend to complement this retail provision, and occupies 15% of all units in Trim. Approximately half of these leisure uses are occupied by restaurants and in addition to this, there are seven accommodation providers in the town. Arts, entertainment, and recreation services account for 4.5% of all uses in the town. As the town develops as a tourist destination, it is expected that the provision of leisure and entertainment uses will increase along with comparison retail to serve the visitor market. Health and education uses occupy 16% of the total uses, while the remainder of the town’s uses are service-related.

Table 12: Retail Unit Types in Trim Town Centre



In terms of multiple representation in the town centre, an ALDI convenience store opened at the end of 2017 adding a new retail frontage to Watergate Street. In addition, there is a Kilkenny Design retail store in the ground floor of the Trim Castle Hotel, as well as Vodafone and ‘3’ mobile phone shops and a Choice Store on Market Street. There is also a LIDL convenience supermarket located on the edge of the town centre.

### Levels of Vacancy

Trim has a vacancy level of 6.6% of all uses covered by the land use survey of town centre units for this strategy. The town is generally vibrant with a good range of comparison retailing featuring in the main town centre streets. There is, however a cluster of vacant units to the west end of Market Street at the junction with Watergate Street, which should be a particular focus given their prominent location. It is widely accepted that environmental and pedestrian amenity improvements to the public realm significantly improve the viability of adjacent retail units.

In the main area of the town, convenience retailing takes place in the northern part of the town centre with both Supervalu and LIDL located outside the historic core of Trim. An Aldi convenience

store has opened at Watergate Street is a welcome addition to the historic town centre, activating the western part of Trim town centre.



Figure 19: Vacant Addresses in Trim Town Centre



Figure 20: Historic Former Retail Vacant Unit on Market Street (West)

## Key Actions and Recommendations for Trim

In undertaking this Health Check for Trim Town Centre, it is evident that Trim has made considerable strides in positioning itself as a tourist centre. Refurbishment of the public realm in the eastern parts of the town centre has provided an attractive public realm for visitors. However, western parts of the town are less pedestrian friendly, particularly at the busy junction of Market Street and Watergate Street. Public realm upgrades to this part of town, along with potential additional footfall of shoppers accessing the ALDI store on Watergate Street could assist with reuse of a cluster of vacant buildings in this location, many of which are historic buildings. These buildings are of great value to tourist centres such as Trim.

Section 6.0 of this Strategy provides a guide to the quantum of additional floor space potential envisaged for Trim during the lifetime of the county development plan. Section 7.2 of this Strategy identifies retail opportunity sites and the core retail area for Trim. The following key actions are considered important in maintaining the future health of Trim town centre:

- Ongoing investment in the public realm to all parts of the historic town centre;
- Proactively engaging with landowners to remedy vacancies in the western part of Market Street;
- Ensuring pedestrian connectivity to and from the ALDI store on Watergate Street is maximised;
- The creation of north-south pedestrian connectivity to and from Finnegan's Way and Market Street; and
- Closely consider the health of the town centre for any further proposal for out of centre developments including un-commenced retail warehousing on the Dublin Road.

## 5.3 Kells

Kells is the biggest town in north County Meath, having a population recorded in the 2016 Census of 6,135 residents. Kells is not a significant retail provider or employment centre but plays an important role as a 'district centre' for the north County Meath area.

### Attractors

Kells has a strong association with the ancient Book of Kells, which attracts tourists to the town. Other tourist attractors to the town include the Kells Round Tower at St Columba's Church, and the 18<sup>th</sup> Century Spire of Lloyd. The main accommodation provider is the Headfort Arms Hotel, beside which the Kells Tourist Office occupies the historic former Town Hall building

Figure 21: Cannon Street view of St Columba's Church Round Tower<sup>17</sup>

Kells does not have a significant retail presence, and many parts of the main streets are visibly in decline with high levels of vacancy. It is, however an attractive town with a historic built form and low levels of traffic congestion. In the east of the town centre is a relatively new development on Farrell and Bective Streets which contains a Centra convenience store and a retail carpet store. Kells has two notable convenience retail stores namely Supervalu and ALDI, both of which are located to the north of the town centre on the R147 Road. A building supply warehouse is located to the west of the town on the R163. Kells plays host to a number of annual festivals including the Guth Gafa International documentary film festival and the internationally recognised Hinterland Festival of Literature and the Arts.

It is noted that Kells was selected in 2017 as the pilot town for the Irish Walled Towns Network's Kick Start Initiative (funded and facilitated by the Heritage Council and led by 'Kells Local Heroes') designed to provide sustainable solutions to activating the town centre while enhancing the heritage of the town.

<sup>17</sup> <https://commons.wikimedia.org/wiki/User:Nemoi/gallery>



Figure 22: New Market Street Comparison Shopping

### Accessibility

Kells is well connected by road with the M3 Motorway allowing for a 15-20 minute trip to Navan and approximately 1 hour to Dublin by vehicle. In the opposite direction, Cavan Town is approximately 45km, taking approximately 45 minutes by vehicle. The N52 connects the town to Ardee in the northeast and the M4 in the southwest. The 109 public bus service connects Kells to Dublin, Navan and Cavan and is a regular service, operating every 30 minutes.



Figure 23: Kells Town Hall and public spaces

Kells' benefits from wide and historic streets with well-preserved architecture being a feature of the town. While there are generally low levels of traffic and generous footpaths, the town does not provide pedestrian crossing points or cycle paths. Investment in the public realm at the civic core of Headfort Place provides the town with a high quality focal point for visitors and locals. Adequate on-street parking exists throughout the town, which has recently been subject to a 'half price' initiative, thus reducing the cost for parking to 50 cent per hour.

### Environmental Quality and Amenity

As mentioned, Kells benefits from its historic built form along with its wide streets and footpaths. There has been some investment in the public realm with pedestrian spaces having been enhanced by high quality paving tree planting, and creation of flower beds at Farrell Street and Headfort Place. It is noted that Headfort Place is not within the retail core but plays a central role in accommodating visitors to Kells. However, Farrell Street appears to be one of the more vibrant retail streets in the town centre. Therefore, continued investment in the public realm is important, equally improvements to other areas in the town centre would improve the experience of patrons within Kells.

While traffic congestion is not as problematic as in other towns in County Meath, Kells' pedestrian environment would benefit from more pedestrian crossings, at strategic locations such as the four-way intersection of Castle Street, John Street, Cross Street and Market Street. Given the town's focus on tourism as an economic driver, an additional pedestrian crossing of Cannon Street could be located to serve visitors to St Columba's Church Round Tower.



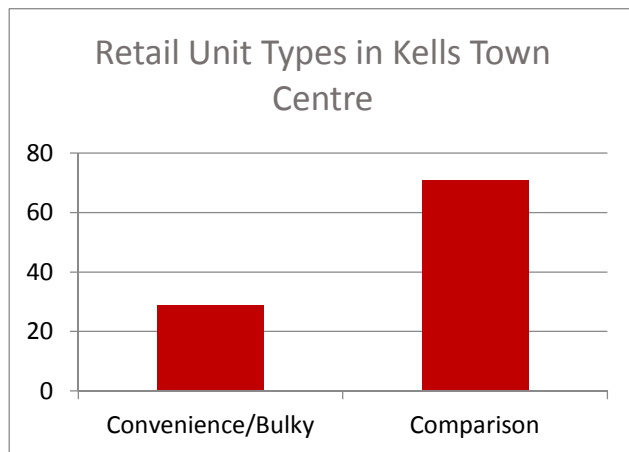
Figure 24: Environmental quality and amenity indicators for Kells

A total of 6% of the overall zoned land in Kells provides for ‘green’, recreation or conservation use. This low provision has an impact on the town’s environmental quality and amenity with the most central open space amenity to the retail core being located adjacent to Kells Swimming Pool – some distance from the retail core.

## Diversity of Uses and Multiple Representation

The land use survey of town centre units for this strategy indicates that Kells' retail units occupy 23.5% of all of the town centre's units with 7% being convenience goods units (29% of retail floorspace) and 16.5% being comparison goods units (71% of retail floorspace). Leisure uses tend to complement retail uses well by catering for shoppers, and while Kells leisure uses occupy 14% of the total occupied units, over half of these are public houses, while less than half are for food service.

Table 13: Retail Unit Types in Kells Town Centre



Reflecting the town's function as the administrative centre of north County Meath, there are high levels of service uses in Kells with professional, public administration and other service activities occupying 29% of the total occupied uses in the town. Arts, entertainment and recreation occupy 5% of all units, which when compared to Navan is high, but could be improved given the emphasis on the tourism industry as a growth sector for the town. Kells contains two 'multiples' within the town centre, one of which has occupied a unit adjacent the petrol station to the east of the town, and the other a pharmacy. ALDI has a store out of the town centre.

## Levels of Vacancy

Kells has a vacancy rate of 18.7% of all units covered by the land use survey of town centre units. Some parts of the town centre appear to be in serious decline with clusters of vacant buildings in prominent parts of the town such as at the four-way intersection of Market, John, Cross and Castle Streets. Many of the buildings that lie vacant appear to be of great heritage value, which represents both challenges for adaptive reuse and opportunities for enhancement of the historic town.





Figure 25: Vacant Former Retail Buildings on Market Street

It is widely accepted that environmental and pedestrian amenity improvements to the public realm significantly improve the viability of adjacent retail units. Southern and eastern parts of Kells, in particular Headford Place and Farrell Street are well activated streets with Farrell Street, in particular containing a good mix of retail. Both of these streets have been subject to investment in public realm upgrades.

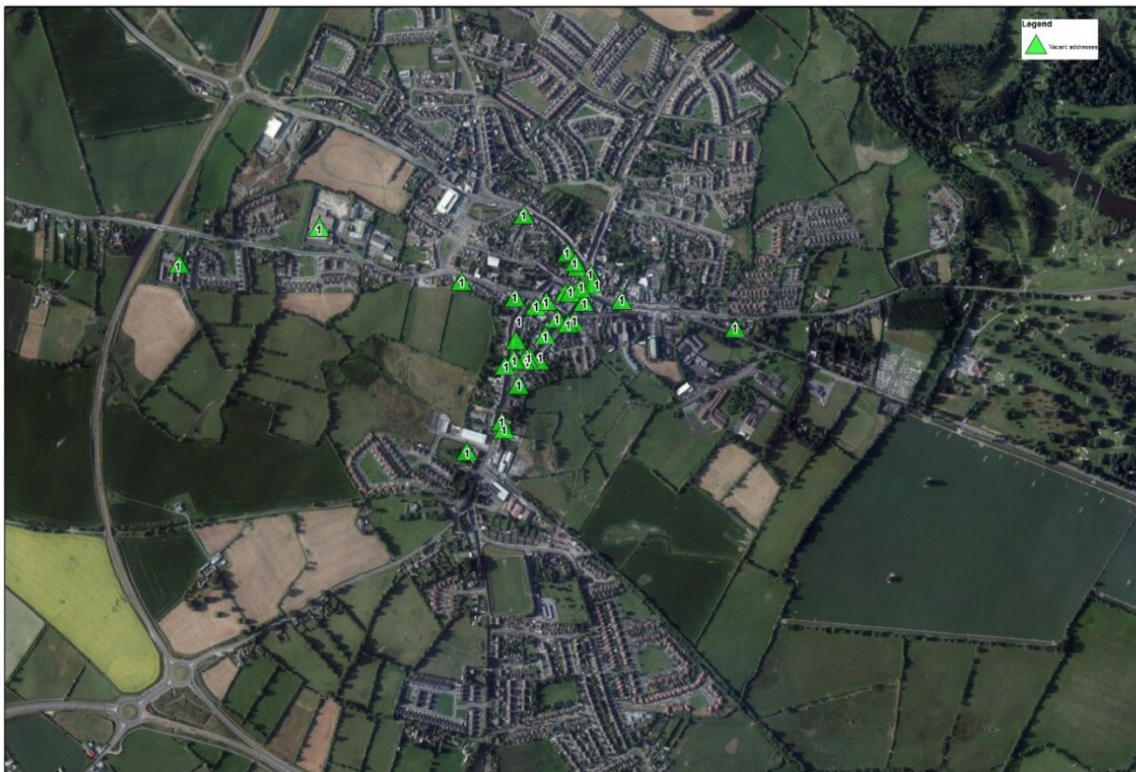


Figure 26: Vacant addresses in Kells Town Centre

### Key Actions and Recommendations for Kells

In undertaking the Kells Town Centre Health Check it is clear that Kells is a pleasant town with visual interest primarily through its historic built form. However, a number of areas for improvement have emerged from this analysis, including provision of pedestrian crossings, green space and addressing vacancy in key locations such as the main crossroads.

Section 6.0 of this strategy provides a guide to the quantum of additional floor space potential envisaged for Kells during the lifetime of the county development plan. Section 7.2 of this strategy identifies Retail Opportunity Sites and the Core Retail Area for Kells. The following key actions are considered important in maintaining the future health of Kells town centre:

- Proactively engaging landowners of key town centre sites, where vacancy is visually prominent;
- Providing more green spaces, street trees and recreation areas to the town centre;
- Creating pedestrian crossings at key locations;
- Closely consider the health of the town centre for any further out of centre planning applications for retail development; and
- Focus on improving the visitor experience and provision of retail adjacent to visitor attractions.

## 5.4 Dunshaughlin

Dunshaughlin is located in the southeast of County Meath and is traditionally known as the half way point between Navan and Dublin. The town has been growing steadily in population in recent decades and 4,035 residents were recorded in Census 2016.

### Attractions

As a place to live and visit Dunshaughlin has benefited significantly from the construction of the M3 Motorway, which by-passes the town to the west. Prior to this, the town's linear centre was heavily congested with traffic and subject to long delays. With the main street (R147), now not being the only vehicle route north and south, reduced traffic has brought a calmer feel to the town. The main street contains a vibrant retail presence with small boutiques and hair salons mixed with numerous café's and newsagents, along with a flower shop and a pharmacy. The main street commercial strip is supplemented by Supervalu and Lidl convenience stores located just off the Main Street.

Outside the town centre to the southeast, Dunshaughlin Business Park contains a number of large businesses, which provide the town with an additional employment attractor. The business park holds a mix of business including some retail bulky goods (furniture), a tool hire depot, and a school uniform supplier.

The town itself is not considered a tourist attractor, however it is an important service town for important local attractions such as the ancient Hill of Tara and Tayto Park Theme Park, both of which

are approximately 11 kilometres from the town. A number of local bed and breakfast primarily exist on the outskirts of Dunshaughlin that serve visitors to the area.

### Accessibility

Dunshaughlin is highly accessible to all parts of County Meath and beyond, being located near the M3 Motorway and the R125 regional road which links to a radial connection to the town onto the M4 and M2, culminating in Swords in the east. The 109 public bus service linking Cavan to Dublin also provides the town with a regular (typically every 30 minutes) public transport link to Navan, Cavan and Dublin.

In terms of pedestrian accessibility, Dunshaughlin is easy to orientate given its linear built form. In a pedestrian sense, the town benefits from having been by-passed by the M3 Motorway and the associated traffic reduction. While there is a reasonable provision of footpaths, the pedestrian environment remains highly vehicle dominated however, with only two pedestrian crossings provided on the R147. The central pedestrian crossing is located close to the Garda Station and the junction with The Dales, which accesses the Supervalu supermarket.

### Environmental Quality and Amenity

With Dunshaughlin's long standing association with traffic congestion as a result of the N3 and 'ribbon development' along the road corridor, it is not surprising that the town has a shortfall in parks and amenities close to its central spine. Dunshaughlin has an overall provision of only 8% of its overall zoned land dedicated to 'open space' use. It is noted that some reasonably sized recreation spaces have been created to cater for the town's growing population, particularly on the western side of the N3 where the majority of the modern residential development has occurred.

It is noted that particular opportunities exist to create a focal point or civic space for the town at the junction of The Dales and the N3. In addition, the east-west river corridor has been undergrounded close to Lagore Road and surfaces again at the Dales Recreation Park. Opportunities exist to utilise this river corridor in the provision of environmental amenity for the town.

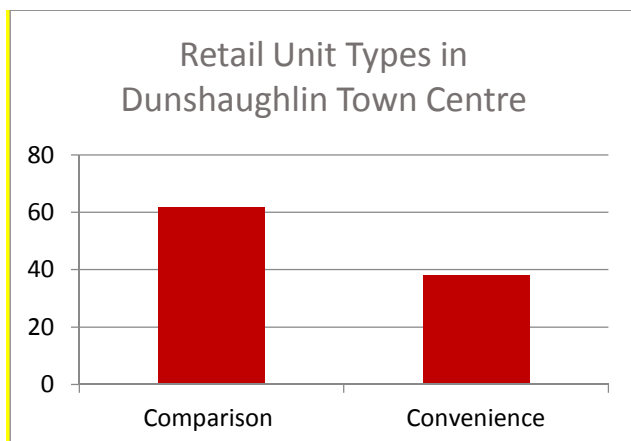


Figure 27: Environmental Quality and Amenity Indicators for Dunshaughlin

### Diversity of Uses and Multiple Representation

Of the all units recorded in the land use survey of town centre uses in Dunshaughlin, 25% are occupied by retail uses with 15.5% being comparison units (62% of retail floorspace), and 9.5% being convenience uses (38% of retail floorspace). Alongside this, 11% of all units are used for accommodation and food service activities, most of which are restaurants and cafes, whilst there is only one registered accommodation provider in the town. Services, professional, health and education occupy a large bulk of the remainder of units. There are two convenience stores operating in Dunshaughlin, Supervalu and Lidl.

Table 14: Retail Unit Types in Dunshaughlin Town Centre



## Levels of Vacancy

Out of all uses surveyed in the land use survey of town centre units, vacant units make up 14.4% of the units surveyed. This is a moderate level of vacancy and is perhaps indicative of a change in focus for the town compared to its historic development pattern i.e. serving traffic flows. There are concentrations of vacancy in the northern and southern extremities of the town, while the central area around the junction of the Dales shows less vacancy. This pattern shows a natural concentration of retail services as the town moves from being focussed on transitional trade, to locally-based trade.

It is widely accepted that environmental and pedestrian amenity improvements to the public realm significantly improve the viability of adjacent retail units. Public realm upgrades at the junction of the Dales and the R147 could reinforce this concentration activity and provide a civic focal point for town as well as supplementing further commercial growth in this location.



Figure 28: Vacant addresses in Dunshaughlin

## Key Actions and Recommendations for Dunshaughlin

In undertaking this health check, it is clear that Dunshaughlin has benefitted from the M3 By-Pass in terms of pedestrian accessibility, environmental quality and amenity. While there is a good mix of retail and leisure uses present in the town, it is not a retail destination and serves predominantly the population of the town. Opportunities exist for Dunshaughlin to underline its transition from a town that serves traffic, to one which is focussed on its resident population.

Section 6.0 of this strategy provides a guide to the quantum of additional floor space potential envisaged for Dunshaughlin during the lifetime of the county development plan. Section 7.2 of this

strategy identifies Retail Opportunity Sites and the Core Retail Area for Dunshaughlin. The following key actions are considered important in maintaining the future health of Dunshaughlin town centre:

- The preparation and implementation of a Public Realm Plan for the settlement, to make improvements to the streetscape with the intention of improving Dunshaughlin's sense of place;
- The creation of a town centre civic square, or focal point to improve the environmental amenity, pedestrian accessibility and consolidate the town's transition from vehicle through-route;
- The creation of new recreational open space with possible use of the town's undergrounded river corridor; and
- Proactively engaging with landowners of vacant peripheral units to encourage reuse or adaptive reuse as community, leisure or residential units.

## 5.5 Ashbourne

Ashbourne has a significant influence in the retail sector in County Meath. Since the creation of the new mixed use 'town centre' at High Street, Ashbourne has grown in population year on year. A further 1,300 people have resided in Ashbourne since the 2011 census of population, representing approximately 11% growth and bringing the population of the town to 12,679 residents – the second largest town in County Meath.

### Attractors

Ashbourne attracts shoppers from wide and far given the scale of the retail on offer in the town. According to the floor space survey of this Strategy (See Chapter 6), Ashbourne's wider urban area has over 40,000 sq.m of retail floorspace, which is less than half of Navan's but over 25% more than the next largest retail centre in the county – Trim.



Figure 29: High Street, Civic Space and Public Library



Figure 30: Frederick Street Shopping Ashbourne

Unlike many towns in the County, Ashbourne is not a significant historic centre or tourism attractor, having grown rapidly from a small village since the early 2000's. Tayto Park, a theme park is located a few kilometres to the north and represents the primary tourism attractor of the area. In addition to the residential offer, the town's retail offer is a significant attractor to the town. The Killeglad Walk development, named 'High Street Ashbourne' is anchored by Tesco convenience supermarket and offers two-hour free car parking. The centre contains numerous comparison retail units along High Street as well as civic uses such as a library and citizen's advice centre. Frederick Street adds to this offer with a hardware store, ladies boutique and further north a Supervalu and Dunnes Stores.

### Accessibility

Ashbourne is well connected by road with the M2 and R135 connecting the town with Dublin, and the R125 providing an east-west connection to and from neighbouring towns of Ratoath and Dunshaughlin. There are regular public busses serving the town, with the 103 bus operating a service to and from Dublin approximately every 20 minutes, and a local bus (109A) operating a service between Ashbourne, Ratoath and Dunshaughlin approximately every 60 minutes. Transport connections to and from Dunboyne is limited, however both by road and public transport. Although pedestrian accessibility within the town is reasonable, the new developments at High Street are not well connected to Frederick Street. The town centre is generally accessed by vehicle, and connections to the outlying residential developments tend to reflect this, with many cul-de-sac type developments not lending themselves to walkability to and from the town centre.



Figure 31: Bus stop on Frederick Street, Ashbourne

### Environmental Quality and Amenity

Ashbourne's rapid growth in population has been accompanied with only limited growth in open space and recreation space. Of all of the town's zoned land, only 10% is zoned for open space, recreation or conservation type uses. Although the Broadmeadow River runs through the town and provides a focal point for open space provision, this is limited and generally lacks recreation infrastructure or 'playspace'. This open space is the subject of upgrading by Meath County Council. In Q2 2019, Phase 1 of the Ashbourne Linear Park has commenced in the form of re-installation of a pedestrian footbridge and development of a play area.

Once completed, the new amenities provided by Meath County Council at Ashbourne Linear Park will significantly improve the environmental quality and amenity of the town centre.





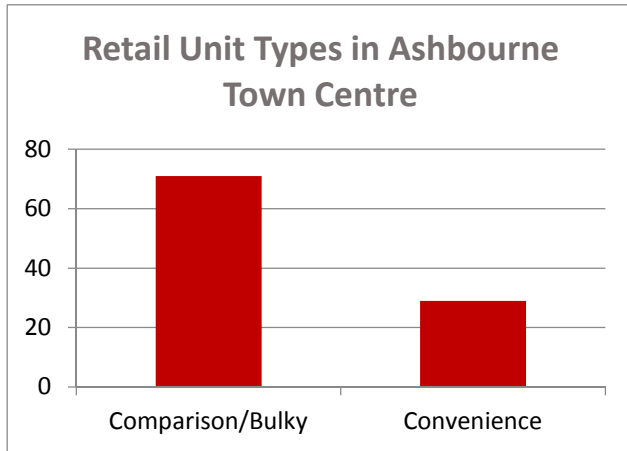
Figure 32: Environmental quality and amenity indicators for Ashbourne Town Centre

The town benefits from a separated cycle way along Frederick Street, and the street at 'High Street Ashbourne' are high quality in terms of pedestrian use, particularly at the new 'Civic Space' where the library is located. Overall, the High Street development presents well aesthetically, however opportunities exist to improve permeability to Frederick Street as well as the town centre to surrounding residential developments. While there are some street trees at the Tesco car park, these are limited and the bulk of the new development is hard surfaced with basement car parking limiting landscaping opportunities.

### Diversity of Uses and Multiple Representation

Retail is a prominent use in terms of retail floor space in Ashbourne with over 40,000 sq.m dedicated to retail uses in the wider Ashbourne urban area. Retail also makes up 24% of all units in Ashbourne's town centre, with comparison shopping taking up 17% (71% of retail floorspace) and convenience taking up 7% (29% of retail floorspace) of all uses covered in the land use survey of town centre units for this strategy. Accommodation, food and beverage uses comprise 14.5% of all units covered by the survey, the vast majority of those are restaurant units. Health services take up 7% of all units covered, while Arts, Entertainment and Recreation services comprise 5.5%.

Table 15: Retail unit types in Ashbourne Town Centre



Ashbourne contains numerous ‘multiples’ stores with all the main convenience retailers present in the town, as well as comparison shops such as Carphone Warehouse, Eason, Boots, Jack and Jones and New Look. The Ashbourne Retail Park is zoned for Retail Warehousing and contains many vacant units.

### Levels of Vacancy

Out of all of the units surveyed in the land use survey for Ashbourne Town Centre, 18.6% were vacant. There is a particular concentration of vacancy at the northern end of High Street, which holds potential for expansion of both leisure and retail comparison uses to extend the vibrancy of the town centre.

The Ashbourne Retail Park contains over 10,000 sq. m of retail space, much of which is presently vacant. The Park contains seven vacant units and a vacant anchor store. Argos Extra and Petmania retail stores continue to operate there in addition to a medical facility, a number of entertainment/leisure uses and a diner. Opportunities exist to re-purpose this out of town Retail Park, which could have a positive effect on consolidating the town centre.



Figure 33: Vacant Addresses in Ashbourne Town Centre

### Key Actions and Recommendations for Ashbourne

In undertaking this health check for Ashbourne Town Centre, it is clear that Ashbourne is a successful retail destination. While the new part of the town provides well for shoppers with ample car parking and a wide variety of shopping choice, it does lack connectivity with Frederick Street and green space/ soft landscaping. The level and quality of open space and recreation provided for the adjacent residential population are also low. In addition, the northern part of High Street and Ashbourne Retail Park contains high concentrations of vacancy.

Section 6.0 of this strategy provides a guide to the quantum of additional floor space potential envisaged for Ashbourne during the lifetime of the county development plan. Section 7.2 of this strategy identifies Retail Opportunity Sites and the Core Retail Area for Ashbourne. The following key actions are considered important in maintaining the future health of Ashbourne town centre:

- The completion of the Ashbourne Linear Park and associated playspace;
- A focus on 'greening' and provision of recreation space of the town centre to soften the landscape and increase levels of environmental quality and recreational amenity;
- Establish a strong pedestrian connection between High Street and Frederick Street;
- Proactive engagement with landowners to remedy vacant units in northern parts of High Street;
- Strategic planning (including proactive engagement with landowners) to remedy vacancy in the retail park to the north of the town centre and adjacent industrial and business parks, where possible directing compatible retail uses to vacant units within the town centre.

## 5.6 Laytown/Bettystown

Laytown / Bettystown are a combined settlement that is dispersed along the seafront in the eastern part of County Meath. There are two distinct centres; Laytown in the south (adjacent the Railway Station) and Bettystown in the north. Bettystown is a larger centre, containing more town centre type uses. The combined settlement has seen unprecedented level of population growth in the last twenty years. The 2016 Census has recorded the total population within the settlement boundaries as 11,872, making it the third largest settlement by population in County Meath behind Ashbourne and Navan.

### Attractors

Laytown / Bettystown have a natural attractor of the seafront, which attracts residents and visitors alike. Laytown being a station on the Belfast-Dublin train line increases the settlement's attractiveness for both cohorts. Laytown hosts the Annual Laytown Strand Races, a historic horserace event, which first took place in 1868. The Laytown Strand Races take place on the beach, and the event attracts up to 11,000 spectators each year, typically in early September.



Figure 34: Historic Neptune Beach Public House in Bettystown<sup>18</sup>Figure 35: Laytown Beach Sculpture<sup>19</sup>

Recent decades have seen the town grow in population. This manifests itself most visibly in Bettystown where the scale, density and form of the housing has changed radically with the 'Bettystown Town Centre' having been constructed – an expansive development consisting of several blocks of four-storey mixed use development. Apartment blocks have been left partially constructed and the ground floors of the completed blocks (earmarked for retail units) remain boarded up along with a 120 bedroom hotel. A Tesco convenience and comparison retail superstore and a single charity comparison retail store are the sole active commercial uses in this development.

### Accessibility

Laytown / Bettystown is accessible by road via the R150. It is approximately 10km from the M1 and approximately 12km from Drogheda Town Centre. The Belfast-Dublin rail line stops at Laytown and there is a park and ride facility at the town. In addition, public buses every 30 minutes provides public transport to and from the settlement. Within the settlement, traffic congestion is a rarity and public footpaths running along the R150 provides for adequate pedestrian movement. The linear beach is also used for pedestrian as well as vehicle movement – with specific designated parking areas along the beach.

### Environmental Quality and Amenity

Laytown / Bettystown offers the environmental and amenity benefits associated with the seafront. The Beach, while subject to large tidal changes, is highly accessible and provides the settlement with a natural playground for residents and visitors alike. Of all the zoned land in Laytown / Bettystown, 21% of it is zoned for open space or recreation uses. Much of this zoned land is associated with the recently completed Scoil Olibhear Naofa south of Bettystown, along with the beach itself. There is a large playground close to the train station in Laytown, while the Bettystown playground is outside the town centre close to the suburban housing developments to the west of the town. These amenities provide the town with amenity space for its ever-growing resident population.

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<sup>18</sup> <http://www.geograph.ie/photo/556756>

<sup>19</sup> <https://commons.wikimedia.org/wiki/File:Laytown-Voyager.jpg>



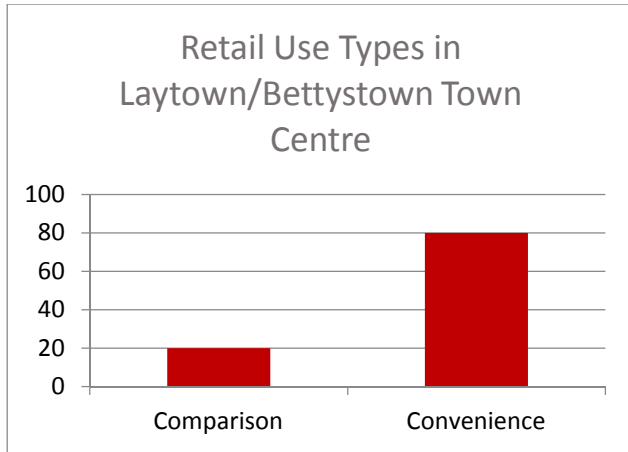
Figure 36: Environmental quality and amenity indicators for Bettystown

But for a few older buildings such as the Neptune Beach hotel and McDonough's Public Houses, the built form of Laytown and Bettystown is unremarkable and does not add to the environmental quality of the settlement. While the public realm is functional in Bettystown town centre, it is not one of high quality or contains any seating or green areas that could add to the attractiveness of the place. Opportunities exist to create a distinctive and people friendly public realm at the historic core of Bettystown (the junction of Coast Road and the R150).

### Diversity of Uses and Multiple Representation

*Bettystown's retail sector makes up 20% of all uses covered in the land use survey of town centre units, with comparison shopping taking up 4% (20% of retail floorspace) and convenience taking up 16% (80% of retail floorspace) of all uses covered in the land use survey of town centre for this strategy. The leisure uses of accommodation, restaurants and bars occupy 22% of all units covered by the survey. Arts, entertainment and recreation uses occupy 8.5% of the units covered by the survey, while health and education uses occupies 10% of all units.*

Table 16: Retail unit types in Laytown / Bettystown Town Centre



Apart from the Tesco Superstore, Bettystown has a mix of uses that is typical of a seaside holiday location; however its retail sector is limited. The land use survey of town centre units indicates that, despite the scale of its resident population, Bettystown does not have a retail sector of a scale or diversity that serves its needs. Therefore, this contributes greatly to out-flows (leakage) typically to Drogheda given the proximity and scale of retail offer in this competing town.

### Levels of Vacancy

Vacant units in Bettystown core comprise 17% of all uses covered by the land use survey of the traditional town centre units. There are a number of locations in Bettystown where vacancy is particularly problematic and has the effect of devaluing their settings.

There are several large vacant units within the ground floors of the ‘Bettystown Town Centre’ including the adjoining former Bettystown Hotel, and constitute a visual eyesore. Therefore, its continuing vacancy and incompleteness should be remedied as a priority. Re-commencement of development works on this site has occurred recently which will assist in its rejuvenation. At a lesser scale, but in a location of great prominence, the site of the former ‘Last Straw’ public house is the centrepiece of Bettystown crossroads and its vacancy presents a visual eyesore. Also the Supervalu convenience store unit within ‘The Anchorage’ development remains vacant. Adaptive reuse or redevelopment of these sites should be proactively pursued as a priority action for the town.



Figure 37: Vacant ground floor retail units at 'Bettystown Town Centre'

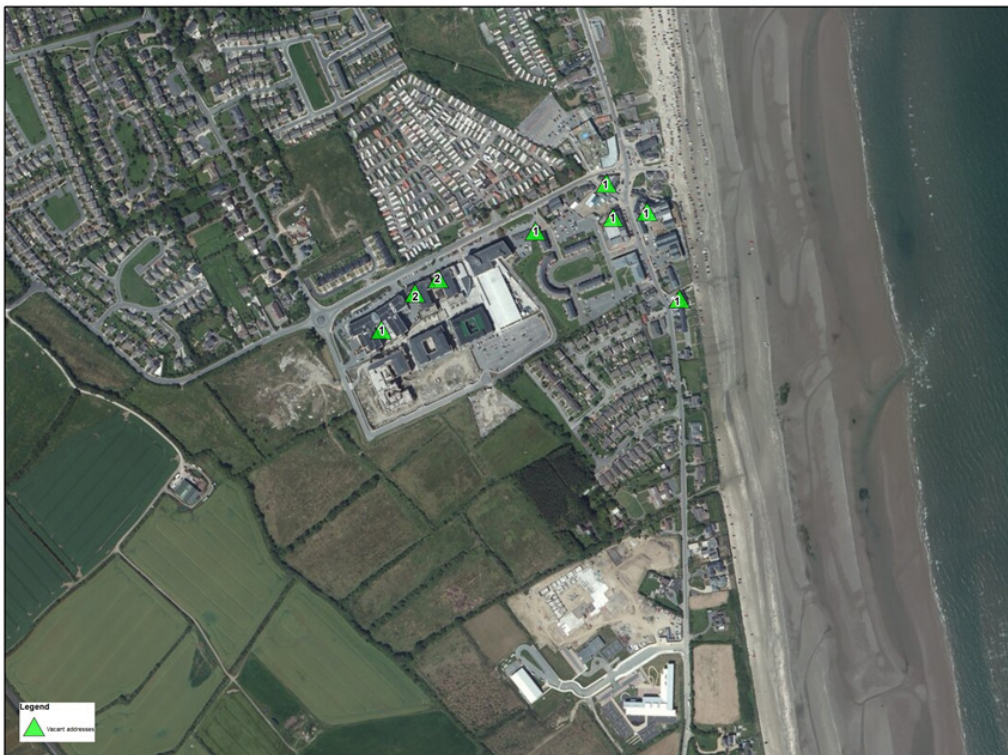


Figure 38: Vacant Addresses in Bettystown



## Key Actions and Recommendations for Laytown/Bettystown

In undertaking this health check, it is clear that Laytown / Bettystown have, in recent decades been the subject of significant growth in population. The planning for this growth along with the market response has not been a resounding success with extensive vacancy at ‘Bettystown Town Centre’ being a case in point. In addition, prominent vacant sites in Bettystown present an eye-sore. The settlement does continue to act as a popular holiday and residential destination with great amenity provided by the seafront. In retail terms, Laytown / Bettystown do not have a quantum or diversity of development sufficient to prevent out-flows to centres like neighbouring Drogheda.

Section 6.0 of this strategy provides a guide to the quantum of additional floor space potential envisaged for Laytown / Bettystown during the lifetime of the county development plan. Section 7.2 of this strategy identifies Retail Opportunity Sites and the Core Retail Area for Laytown / Bettystown. The following key actions are considered important in maintaining the future health of Laytown / Bettystown:

- Upgrading the public realm at the junction of the Coast Road and the R150 in Bettystown including to provide a high-quality pedestrian and public seating environment;
- Strategic planning (including proactively engaging with landowners) and design for successful activation and / or repurposing of the former Last Straw Public House at the junction of the Coast Road and the R150; and the former Supervalu convenience store on Main Street, Bettystown.
- Strategic planning (including proactively engaging with landowners) and design for successful activation and / or repurposing of ground floor retail units at ‘Bettystown Town Centre’ as well as the completion of the unfinished parts of the development.

## 5.7 Dunboyne

Dunboyne, along with Clonee is the closest settlement to the Dublin metropolitan area, being only 3km from the county border, and 7.5km from Blanchardstown Shopping Centre. The population of Dunboyne (and environs) was recorded as 7,272 in the 2016 Census.

### Attractors

Dunboyne is an attractive place to live given the combination of its rural setting and pleasant village feel within such close proximity to the city. Visitors and locals are also attracted to the town as it contains the Dunboyne Castle Hotel and Spa – a Georgian mansion dating to 1764. In addition, there are several sporting clubs that attract supporters frequently at the weekends.

The retail offer within Dunboyne is not sufficient to act as an attractor to the town. Given the proximity to other centres such as Blanchardstown and Ashbourne, Dunboyne’s retail offer is designed to cater for the local population rather than act as an attractor to the town.



Figure 39: Dunboyne Town Centre's wide footpaths and civic spaces<sup>20</sup>

### Accessibility

Dunboyne is exceptionally well connected by road and public transport. The town is located adjacent to the M3, the R147 and the Clonsilla Rail Line. Dunboyne Train Station and the M3 Parkway is a major advantage for the town. In addition, the town is served by the number 70 Dublin Bus, which runs to and from Dublin approximately every 30 minutes.

By way of pedestrian accessibility, Dunboyne is a very pleasant environment with relatively low levels of congestion given the large roads that by-pass the town. Main Street (L2228) features a grassed village square, which contains mature trees and allows for pleasant movement through the central parts of the village. While some on-street car parking exists, the public realm of the town centre has been carefully designed for use by pedestrians.

It is important for the town to maximise its connection with the rail line. In this regard, the pedestrian environment between the Dunboyne Railway Station to the town centre should be safe, activated and clearly legible to pedestrians. This is particularly important to maximise a potential for tourism, particularly day-trippers from Dublin City Centre.

<sup>20</sup> <http://www.geograph.ie/photo/673656>

## Environmental Quality and Amenity

Dunboyne has high levels of environmental quality and amenity, primarily due to the predominance of green space and street trees within the village centre. This is aided further by a well-preserved built environment, which adds to the quaint village feel.



Figure 40: Environmental Quality and Amenity Indicators for Dunboyne

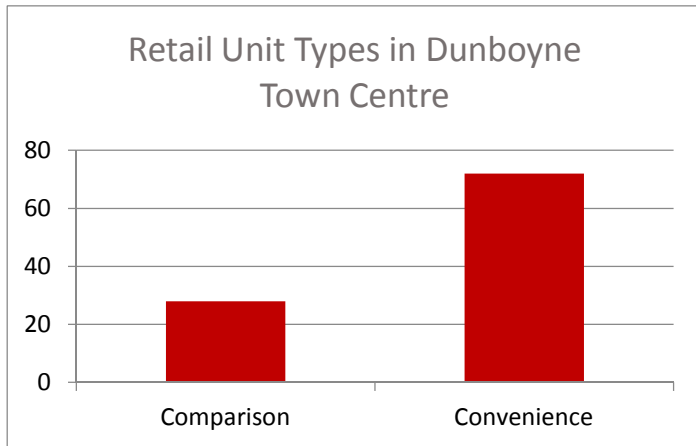
Of all the zoned land in Dunboyne, 11% is zoned for open space or recreation uses. While this level is not high compared to other towns in County Meath, the quality of the spaces coupled with their central location gives Dunboyne excellent environmental quality and amenity. The town park to the south of the main crossroads is a fine example of a high-quality town centre park, containing a skate park and playground, picnic tables, as well as access to the Castle River. As can be seen from Figure 40 above, the Castle River provides the town with a focal point for environmental quality and amenity and is appropriately zoned with open space along its corridor.

## Diversity of Uses and Multiple Representation

Retail uses occupy 33.3% of all uses covered by the land use survey of town centre units for Dunboyne. Overall there is a moderate provision of comparison and convenience goods units with only 9.5% (28% of retail floorspace) and 23.8% (72% of retail floorspace) of all units respectively from these categories. Opportunities exist to expand the retail offer (particularly the comparison) in the town. Leisure uses in the town are more common in Dunboyne than retail with 14 restaurants,

hotels and bars making up 18.5% of all units covered by the survey. Health and education uses occupy a high proportion of units at 19.5%, while Arts, Entertainment and Recreation uses occupy 4.5% of the total units surveyed. Eurospar and the recently opened Supervalu convenience store are the primary convenience offering within Dunboyne, while Your Local Pharmacy is the only comparison retail multiple in the town.

Table 17: Retail Unit Types in Dunboyne Town Centre



### Levels of Vacancy

Dunboyne has a low level of vacancy within the town centre compared to other towns within County Meath with only 5.12% of the total units covered by the land use survey of town centre units being identified as vacant. This could be in part explained by the absence of an out of town supermarket or shopping centre. This level of vacancy is considered to be a natural level of vacancy in terms of town centre health.



Figure 41: Vacant addresses in Dunboyne Town Centre

### Key Actions and Recommendations for Dunboyne

In undertaking this health check, it is clear that Dunboyne is a healthy town with many advantageous features including high environmental quality and amenity and outstanding accessibility through various modes of transport. For Dunboyne to grow and develop as town, it does need to expand its retail offering commensurate with its population and economic opportunities such as tourism.

Section 6.0 of this strategy provides a guide to the quantum of additional floor space potential envisaged for Dunboyne during the lifetime of the county development plan. Section 7.2 of this strategy identifies Retail Opportunity Sites and the Core Retail Area for Dunboyne. The following key actions are considered important in maintaining the future health of Dunboyne:

- Ensure the pedestrian environment between Dunboyne Railway Station and Dunboyne Town Centre is safe, activated and clearly legible to pedestrians in order to maximise a potential for tourism, particularly day-trippers from Dublin City Centre; and
- Focus on expanding the retail offer with a local craft and design offer, complementing the heritage and visitor attraction of the town.

## 5.8 Enfield

Enfield is in the south west of County Meath close to the border with County Kildare. Much like Dunshaughlin, it is a town that has been by-passed in recent years and prior to that was subject to high levels of traffic congestion. Enfield has grown in population since the 2011 Census by approximately 300 residents to 3,239, as recorded by the 2016 Census.

### Attractors

Enfield is not a significant employment, visitor or retail centre. Enfield Business Park to the northwest of the town centre contains a number of small enterprises including an engineering workshop and a An Post Sorting Office. Aside from this, Enfield contains a typical mix of retail, services and residential development. Supervalu (See Figure 42) is the largest retail unit, having been upgraded from a Centra store in recent years. The Royal Canal and Enfield Harbour provides the town with a rich natural and built heritage, as well as environmental quality and amenity. Presently, visitor numbers passing via the Royal Canal are limited.

The Enfield area contains a number of outlying attractions including a number of golf courses. Johnstown Estate a hotel complex with 126 bedrooms, centred on a Georgian County House dating from 1761. This hotel is an attractor of visitors to the area that include tourists and wedding party guests. Johnstown Estate is located approximately 1.5km south of Enfield Town Centre beyond the M4 Motorway but within County Meath.



Figure 42: Supervalu on Dublin Road <sup>21</sup>

<sup>21</sup> <https://maps.google.com/maps/contrib/102669070246839433026/photos>

### Accessibility

Enfield is highly accessible by road and public transport. The R148 (former Dublin-Galway Road) runs through Enfield and the M4 Motorway by-passes the town to the south. There are regular commuter train services stopping at Enfield from both Longford and Sligo, and less regular outside of commuter hours. Regular public buses to and from Dublin and Galway stop in Enfield's Main Street throughout the day.

Within the town, accessibility is reasonable with wide footpaths generally provided along Main Street. Similarly, to Dunshaughlin, the town is spread out along one main street, which was formerly a busy traffic road. The by-passing of the town through the construction of the M3 has improved the pedestrian environment with vastly reduced traffic levels. The Johnstown Road is the only side street along this street and a raised table has been created at this junction as a traffic calming measure. There are two pedestrian crossings along Main Street. From New Street in the east to the Trim Road there is a marked bicycle lane.

### Environmental Quality and Amenity

Enfield Town Centre's environmental quality has dramatically improved since the construction of the M4 Motorway By-Pass. Reducing the level of traffic on the R148 (former Dublin-Galway Road) has reduced level of air and noise pollution in the town centre. The town now contains a bicycle lane running from New Street in the east to the Trim Road in the west, and a raised table (shared surface) at the junction of the Johnstown Road.



Figure 43: Environmental Quality and Amenity Indicators for Enfield

Of all of Enfield's zoned land, 13% is zoned for open space or recreation use. The Royal Canal corridor comprises much of this allocation as well as the GAA club beside the New Road, which provides a large recreation amenity. A new playground was constructed by Meath County Council to the rear of the Supervalu, which provides amenity to the growing residential population. It is not visually prominent in the commercial area, but access is provided via Main Street. Enfield's Main Street lacks high quality seating areas, green spaces and street trees. Opportunities exist to introduce these and increase the amenity to the shopping areas, to provide a better shopping experience.

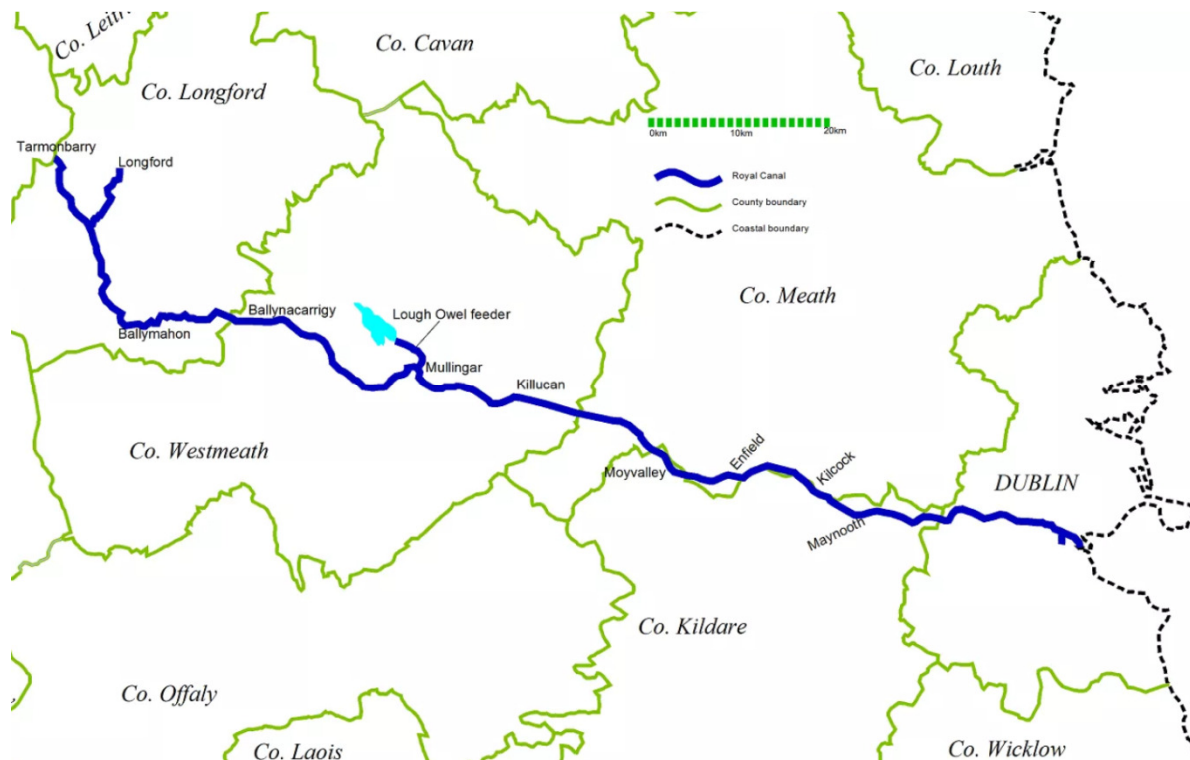


Figure 44: Royal Canal Greenway cycle route<sup>22</sup>

The Royal Canal corridor continues to play an important role in Enfield environmental quality and amenity with its associated flora and fauna biodiversity and open space amenity. Opportunities exist to enhance connections with the Royal Canal corridor and promote outdoor activity along the banks of the canal, for example walking routes to and from Kilcock in the east or the River Boyne in the west.

The Royal Canal Greenway is planned to extend from Dublin and Galway as part of the 'Eurovelo Capitals Route' extending from Moscow in the East to Galway in the west (see Figure 46). The Greenway (expected to be opened to the public in Q3 2019) will promote the tourism profile of Enfield, increase visitor numbers to the town centre as well as providing an invaluable recreation resource for the town.

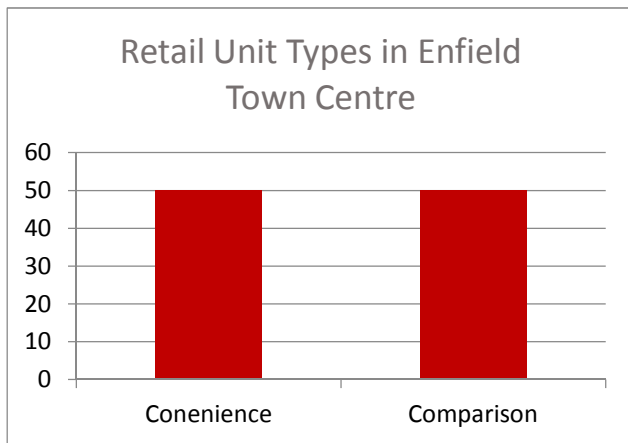
<sup>22</sup> <http://royalcanal.ie/royal-canal-greenway/>



### Diversity of Uses and Multiple Representation

Enfield’s retail sector occupies 19.5% of the total units covered by the land use survey of town centre units, of which roughly half are convenience retail and the other half are comparison retail. Leisure activities including, accommodation, food and beverage, arts, entertainment and recreation comprise 17% of all units while professional, financial and real estate services make up 17.5% of units in Enfield. The convenience stores that exist in Enfield include Supervalu and Tesco Express.

Table 18: Retail unit types in Enfield Town Centre



### Levels of Vacancy

Enfield has a vacancy rate of 16.7% of all uses covered by the land use survey of town centre units. This is a relatively high rate of vacancy, and can in part be explained by the transition that Enfield has undergone in moving from a highly-congested service centre for transiting vehicles, to a centre which caters primarily to its own growing population.

It is widely accepted that environmental and pedestrian amenity improvements to the public realm significantly improve the viability of adjacent retail units. The focus for Enfield town centre should be to consolidate a central area, or focal point for Main Street retail activity. For Enfield, it appears that the focal point for retail is the eastern end of the Main Street where Supervalu and Tesco Express have recently located.



Figure 45: Vacant addresses in Enfield Town Centre

### Key Actions and Recommendations for Enfield

In undertaking this health check, it is clear that Enfield has benefitted from the M4 By-Pass in terms of pedestrian accessibility, environmental quality and amenity. While there is a good mix of retail and leisure uses present in the town, Enfield is not a retail destination and serves predominantly the population of the town. Opportunities exist for Enfield to underline its transition from a town that serves traffic, to one which is focussed on its resident population.

Section 6.0 of this strategy provides a guide to the quantum of additional floor space potential envisaged for Enfield during the lifetime of the county development plan. Section 7.2 of this strategy identifies Retail Opportunity Sites and the Core Retail Area for Enfield. The following key actions are considered important in maintaining the future health of Enfield town centre:

- The preparation and implementation of a Public Realm Plan for the settlement, to make improvements to the streetscape with the intention of improving Enfield's sense of place;
- The creation of a town centre civic square, or focal point to improve the environmental amenity, pedestrian accessibility and consolidate the town's transition from vehicle route;
- The introduction of new green spaces, pocket parks and street trees to increase amenity of Main Street and encourage a better shopping experience;
- Strengthening the connection from Main Street to the Royal Canal corridor including upgrading of footpath and directional/ interpretative signage; and
- Proactively engaging with landowners of key vacant units and opportunity sites to encourage reuse of buildings or adaptive reuse.

## 5.9 Ratoath

Ratoath is located in close proximity to Ashbourne and Dunshaughlin in the south-eastern part of County Meath. As with most settlement centres in this area, Ratoath's population has expanded in recent decades. Its resident population has grown by approximately 500 people since 2011 Census bringing it to 9,533 residents as recorded by the 2016 Census.

### Attractors

Ratoath is not a significant retail or employment centre and the majority of its residents commute to employment centres in Ashbourne or Dublin City. The settlement of Ratoath is therefore comprised mostly of residential development, which surrounds the town centre. While none would be of a scale to attract patrons from wider areas, the main convenience retailers within the town are Supervalu some distance to the south from the main retail core is a Tesco Express.

Fairyhouse Racecourse is located approximately 3km to the south of the town and attracts visitors to the Ratoath during the racing calendar. Tayto Park theme park is located approximately 5km to the north of Ratoath. With Ratoath lying between Tayto Park and Dublin, it is well-placed to capitalise on passing trade.



Figure 46: Supervalu Shopping Centre at junction of R125 and R155 Ratoath<sup>23</sup>

<sup>23</sup> <http://www.geograph.ie/photo/1385873>

## Accessibility

Ratoath is a well-connected town with the M3 Motorway and R125 providing road access to outlying towns and major centres. There are regular busses to and from Dublin every 20 minutes using the 103 and 109 service. The 109A bus service provides access to Dunshaughlin and Ashbourne every 60 minutes.

Ratoath Town Centre has developed at the intersection of the R155 and R125 roads. The town's Main Street is a meandering one which follows the R125, which runs broadly east-west. The main shopping core extends from the Corbalis Shopping Centre in the East to the Supervalu supermarket in the west. There is a reasonable provision of footpaths in the town, with two pedestrian crossings on the Main Street and cycle lanes on the distributor road linking the R125 and R155.

## Environmental Quality and Amenity

Ratoath is generally an attractive town centre with the extensive grounds of the Holy Trinity Church on the Main Street softening the landscape with its mature trees, in turn providing an important landmark for the town. To the rear of the church grounds, the Broadmeadow River corridor is the focus of a large area of open space, which contributes greatly to the environmental quality and amenity of the town. Of all the zoned land in the Ratoath settlement, 14% of it is dedicated to open space and recreation. Indeed a large proportion of this comes from the Broadmeadow River corridor and the local GAA grounds.



Figure 47: Environmental quality and amenity indicators for Ratoath

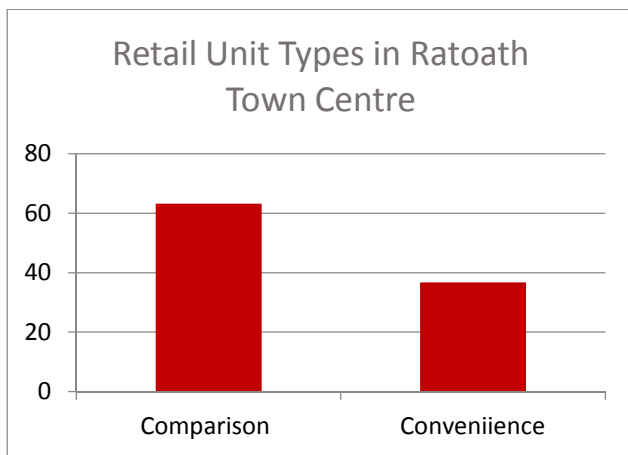
Aside from this, there are some street trees outside the Ratoath Community Centre / Venue Arts Centre and some landscaping at the Corballis Shopping Centre and Supervalu Car Park.

Opportunities exist to create a high quality civic space, for example outside the Ratoath Community Centre / Venue Arts Centre. In doing so would create a defined focal point for retailing in the town centre. Additionally, this would offset the dispersed feel to Ratoath’s long and meandering Main Street.

### Diversity of Uses and multiple Representation

24.5% of all units surveyed for land use in the town centre are used by the retail sector with 15.5% (63% of retail floorspace) of that being comparison goods shopping and 9% (37% of retail floorspace) being convenience goods shopping. To complement this, 25% of all units are for the leisure sector. A large proportion of the remaining units are service-related, and there is a low provision of professional use occupying units with financial, real estate and professional uses comprising only 11% of all units surveyed.

Table 19: Retail unit types in Ratoath Town Centre



### Levels of Vacancy

There are vacant units but there is a vacant site located within the village centre. However, some of the sites that are vacant are particularly prominent. The continuing vacancy of prominent town centre sites such as this should be remedied, in order to improve the aesthetics of the town centre.



Figure 48: Vacant addresses in Ratoath Town Centre

### Key Actions and Recommendations for Ratoath

In undertaking this health check, it is clear that Ratoath's town centre is in good health with a low vacancy rate, however physical improvements could greatly improve the experience of the shopper in Ratoath.

Section 6.0 of this strategy provides a guide to the quantum of additional floor space potential envisaged for Ratoath during the lifetime of the county development plan. Section 7.2 of this strategy identifies Retail Opportunity Sites and the Core Retail Area for Ratoath. The following key actions are considered important in maintaining the future health of Ratoath town centre:

- The creation of a town centre civic square, or focal point to improve the environmental amenity, pedestrian accessibility and consolidate the town's transition from vehicle through-route;
- The upgrading of the footpaths, and removal of clutter to the footpaths along Main Street in order to encourage a better shopping experience; and
- Proactively engaging with landowners of key vacant units and opportunity sites to encourage reuse of buildings or adaptive reuse.

## 5.10 Stamullen

Stamullen is located in the northeast of County Meath, on the border with Fingal County Council and situated close to the M1 Motorway. The closest large town is Balbriggan in County Dublin. The settlement is primarily a residential one, with having a small commercial presence. Stamullen has grown from a rural grouping of houses to a settlement of 3,361 in 2016. Since the 2011 Census, the settlement has grown by almost 300 residents.

### Attractors

Stamullen is a residential-driven settlement and is not considered an employment or retail attraction. There is an extended care and disability care facility to the south of Stamullen, which attracts some employees. Stamullen is located within 1km of the City North Hotel and adjacent Business Campus. Despite this, it is unlikely that this local enterprise attracts visitors or patrons to Stamullen, given that road access to City North is over 7km away via the M1 Motorway. Gormanstown Park Hostel and Leisure Centre is located 3km to the east within County Meath, which attracts large sports and leisure-focussed activities.



Figure 49: View of Stamullen from the North<sup>24</sup>

### Accessibility

As mentioned above, the M1 Motorway is situated close to Stamullen and driving distance to the closest entrance is approximately 7km. The M1 provides Stamullen with access by road to all outlying centres. In addition, there is a bus that runs from Dublin City Centre through the town

<sup>24</sup> [https://commons.wikimedia.org/wiki/File:Stamullen,\\_County\\_Meath\\_-\\_geograph.org.uk\\_-\\_1786664.jpg](https://commons.wikimedia.org/wiki/File:Stamullen,_County_Meath_-_geograph.org.uk_-_1786664.jpg)

approximately every 40 minutes. Even though there is a footpath along the Main Street of Stamullen, there are no pedestrian crossings or cycle paths that exist in the town centre.

### Environmental Quality and Amenity

Despite the population of the settlement, it remains rural in character with many of the surrounding fields used for agriculture. As a result, the settlement's environmental quality benefits from this rural setting. Out of all of the land zoned in the settlement,, 41% of land is dedicated to open space and recreation. More importantly, according to the CSO, Stamullen's settlement area, incorporates some land from County Dublin, which contributes towards this high rate. The vast majority of this open space and recreation land lies to the south of the Main Street and is not considered publicly accessible. Stamullen School and the GAA pavilion provide a large proportion of open space and recreation land for the residential community.

The main street itself lacks environmental quality and amenity. The main street remains a rural road in appearance despite the presence of unremarkable mixed-use buildings which some contain commercial activity. Opportunities exist to upgrade the Main Street to provide public realm amenities, and a sense of place by drawing on the rural heritage of the area that underlies Stamullen.



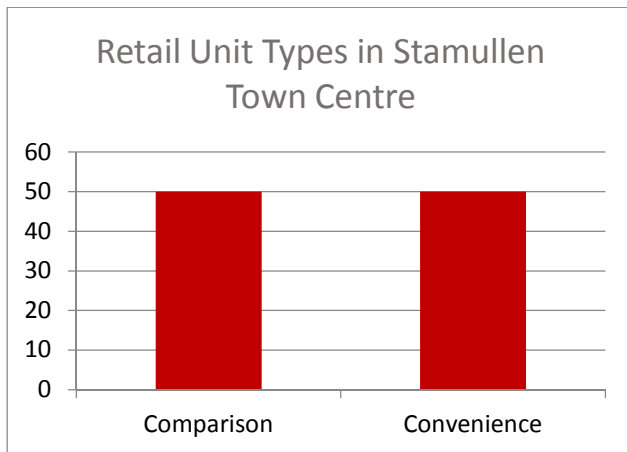
Figure 50: Environmental Quality and Amenity Indicators for Stamullen



### Diversity of Uses and Multiple Representation

The land use survey for Stamullen shows that retail operators occupy 13% of all units in the settlement with two convenience goods retailers (50% of retail floorspace) and two comparison goods retailers (50% of retail floorspace). This indicates that the population relies on neighbouring centres for some of its retail services. In addition, 22.5% of all units are occupied by leisure uses including restaurants, accommodation and sporting clubs. It is also notable that human health and social work activities occupy 19.5% of the total units; a higher than average share when compared to other settlements.

Table 20: Retail Unit Types in Stamullen Town Centre



### Levels of Vacancy

With only two units showing as vacant in Stamullen, the settlement has a low vacancy rate at 5.9%, thus indicates a healthy town centre.



Figure 51: Vacant addresses, Land Use Zoning and Opportunity Sites in Stamullen

### *Key Actions and Recommendations for Stamullen*

In undertaking this health check, it is clear that Stamullen's town centre is in good health with a low vacancy rate, however physical improvements to create a sense of place could greatly improve the experience of the shopper in Stamullen.

Section 6.0 of this strategy provides a guide to the quantum of additional floor space potential envisaged for Stamullen during the lifetime of the county development plan. Section 7.2 of this strategy identifies Retail Opportunity Sites and the Core Retail Area for Stamullen.

The following key actions are considered important in maintaining the future health of Stamullen town centre:

- The preparation and implementation of a Public Realm Plan for the settlement, to make improvements to the streetscape with the intention of improving Stamullen's sense of place; and
- Access and infrastructure improvements to the large public open space to the southeast of the Main Street.

## 6.0 Projected Retail Floorspace Requirements

The following chapter provides a broad assessment of the capacity for additional retail floor space in County Meath for the period 2020-2026. Based on projected changes in the local population, consumer spending and turnover potential, the assessment takes into account of emerging trends in the retail market (as discussed in Chapter 3) and general estimates of future demand.

It is important to note that the estimates of future requirements for retail floor space provided by this strategy are only intended to provide broad guidance as to the additional quantum of convenience and comparison goods floor space provision. The reason for this is so healthy levels of trading can be sustained and should not be treated in an overly prescriptive manner, nor should they serve to inhibit competition - as per the requirements of the *Retail Planning Guidelines* (2012).

An estimate of a future retail floor space potential is derived and followed by allocation estimates for the individual towns of Navan, Dunboyne, Kells, Trim, Ashbourne, Laytown / Bettystown, Enfield, Dunshaughlin, Ratoath, Stamullen and a provision for the remainder of the County.

In brief, the following methodology has been used to inform the future retail floor space requirements:

- Utilise the population projections put forward by Meath County Council for base and design years;
- Estimate the available expenditure per capita for each of the retail categories (convenience, comparison and bulky goods) at the base year and design year;
- Compile a projection of the total available expenditure in the base year and design year for residents of County Meath to allow for assumed expenditure inflows and outflows;
- Undertake a projection of the likely increase of available expenditure which will support the provision of additional floor space;
- Estimate the likely average turnover of existing floor space in convenience, comparison and bulky goods;
- Derive the residual surplus or shortfall between available expenditure and turnover potential;
- Estimate the capacity potential for additional floor space for the County within each of the three retail categories, and account for a nominal level of frictional vacancy; and
- Estimate the distribution of identified additionally required floor space in each of the aforementioned settlements and remaining county.

## 6.1 Population

Since 2006, the resident population of County Meath has grown year-on-year when it was recorded at 162,831. In 2011, the resident population recorded stood at 184,135, representing a 13.08% increase. The population grew again in 2016, with a 5.92% increase, bringing the total population of the county to 195,044.

The future population projections for County Meath as set out within the RSES and are used by this strategy as shown in Table 12.

Table 12 County-wide Recorded Population and Projected Population<sup>25</sup>

Year	2011	2016	2019	2022	2026
Population	184,135	195,044	<b>204,782</b>	214,520	<b>227,500</b>
Source	<i>Census</i>	<i>Census</i>	<b>Projected</b>	Projected	<b>Projected</b>

## 6.2 Expenditure Estimates

Expenditure per capita is calculated based on the data contained within the CSO's Annual Services Inquiry (ASI)<sup>26</sup>. The 2016 November publication reflects a distilled view of national account information to 2014, detailing grossed estimates in the principal trading aggregates for all enterprises in the relevant sectors. Turnover aggregates as related to sectors specifically classed as either convenience, comparison or bulky goods sales are selected.

An adjustment is made for County Meath to relate these national figures to local level. This is achieved by utilising county-level income data for Meath, available through the CSO's publication on County Incomes and Regional GDP<sup>27</sup> (published March 2017). This highlights the per capita income in County Meath which was approximately 97% of the national average in 2012.

Further adjustments are made to this figure to bring it forward, year on year, to the present and throughout the plan period. These adjustments are made in line with recorded economic growth statistics (as available from the CSO) and forecasted levels of growth, as put forward by the ESRI

<sup>25</sup> <https://emra.ie/regional-spatial-and-economic-strategies-2/>.

<sup>26</sup> <https://www.cso.ie/en/methods/services/annualservicesinquiry/>

<sup>27</sup> <https://www.cso.ie/en/methods/nationalaccounts/countyincomesandregionalgdp/>

(Quarterly Economic Commentary 2017)<sup>28</sup> and the Department of Finance (Economic and Fiscal Outlook 2017)<sup>29</sup>.

The per capita spend on an annual basis from 2012 to 2028 has been set out using population projections as outlined previously, in addition to the projections on economic growth. The resulting projected per capita expenditure using these growth rates is given in Table 13 below.

Table 13: Projected Expenditure Per Capita

Year	Projected Per Capita Spend (€)	
	Convenience	Comparison
2012	€3,723	€4,567
<b>2019</b>	<b>€4,303</b>	<b>€5,403</b>
2022	€4,540	€5,801
<b>2026</b>	<b>€4,816</b>	<b>€6,274</b>

### 6.3 Total Available Expenditure

Total available expenditure is calculated by multiplying the population by the expenditure per capita for each retail category, for each year. This is set out below in Table 14.

Table 14 Total Available Expenditure

Year	Convenience Total Available Spend (€)	Comparison Total Available Spend (€)	Comparison Total Available Spend - Excluding Bulky Goods (€) (80%)	Comparison Total Available Spend - Bulky Goods Only (€) (20%)
2012	€693,626,657	€850,975,759	€680,780,607	€170,195,152
<b>2019</b>	<b>€881,176,346</b>	<b>€1,106,437,146</b>	<b>€885,149,717</b>	<b>€221,287,429</b>
2022	€973,920,800	€1,244,430,520	€995,544,416	€248,886,104
<b>2026</b>	<b>€1,095,640,000</b>	<b>€1,427,335,000</b>	<b>€1,141,868,000</b>	<b>€285,467,000</b>

In considering the above expenditure levels, it is important to note that significantly different levels of turnover will apply to comparison goods such as clothing and footwear and smaller household durables than would apply to bulky household goods sold in retail warehouses. Retail warehouses have a distinct function and are generally located outside of a city or town centre. It is considered important to split between expenditure available for bulky household goods and non-bulky comparison goods. Therefore, having regard to the CSO Household Budget Survey<sup>30</sup>, the CSO Annual Services Inquiry and market research estimates that approximately 20% of comparison expenditure can be accounted for by bulky goods. This split can be observed above in Table 14.

<sup>28</sup> <https://www.esri.ie/publications/quarterly-economic-commentary-summer-2019>

<sup>29</sup> <https://www.gov.ie/en/organisation/department-of-finance/?referrer=/en/what-we-do/economic/publications>

<sup>30</sup> <https://www.cso.ie/en/methods/housingandhouseholds/householdbudgetsurvey/>

## 6.4 Adjusted Expenditure

Adjustments to total expenditure are required in order to take account of the levels of inflow and outflow (the trade draw from outside the County and trade leakage out of it). The results from the telephone survey and shoppers survey were utilised to provide percentage share figures for 2017:

- Convenience: 78.5% of respondents surveyed undertook their convenience shopping within County Meath, resulting in *an outflow of 21.5%*. This is down from 22% in 2012 as identified in the previous strategy, though still comparatively high for this type of retail category.
- Comparison Non-Bulky: 35.5% of respondents surveyed undertook their comparison shopping within County Meath, resulting in *an outflow of 64.5%*. This is up from 59% in 2012, identified in the previous strategy.
- Comparison Bulky: 42.5% of respondents surveyed undertook their bulky goods shopping within County Meath, resulting in *an outflow of 57.5%*. This is up from 32.2% in 2012, identified in the previous strategy – a significant increase over such a short period. Levels this high have a significant impact on available spend within the county.

In all cases outflows are assumed to fall by 5% by 2025, reflecting a conservative objective.

There were insufficient respondents to indicate a true level of inflow per retail type. In this study, a nominal assumed inflow of 2% for convenience (fixed), 5% for comparison and 1.5%-3% for bulky goods was assumed over the period.

In addition to this, a small cohort of residents who undertake a portion of their shopping online, were identified as part of the surveys, adding further outflows as follows:

- Convenience: 1% of those surveyed undertook their convenience goods shopping online.
- Comparison Non-Bulky: 1.5% of those surveyed undertook their comparison goods shopping online.
- Comparison Bulky: 3% of those surveyed undertook their bulky goods shopping online.

For the purposes of this study the above rates of online shopping have been incorporated into the 2017 projected year. A conservative growth rate has been applied for convenience and comparison year-on-year until 2025, with convenience doubling to 2% and comparison doubling to 3%. However, bulky goods were maintained at 3% throughout.

Table 15: Adjusted Available Expenditure (Accounting for Inflows and Outflows)

Total Available Expenditure - Convenience Goods					
Year	Convenience Total Available Spend (€)	Convenience - Outflow (%)	Convenience - Inflow (%)	Convenience - Online (%)	Adjusted Convenience Total Available Spend (€)
2012	€693,626,657	22.00%	2.00%	0.00%	€554,901,326
<b>2019</b>	<b>€881,176,346</b>	<b>20.25%</b>	<b>2.00%</b>	<b>1.25%</b>	<b>€709,946,959</b>
2022	€973,920,800	18.38%	2.00%	1.63%	€798,517,664
<b>2026</b>	<b>€1,095,640,000</b>	<b>16.50%</b>	<b>2.00%</b>	<b>2.00%</b>	<b>€914,859,400</b>

Total Available Expenditure - Comparison Goods (Non-Bulky)					
Year	Comparison Total Available Spend (€)	Comparison - Outflow (%)	Comparison - Inflow (%)	Comparison - Online (%)	Adjusted Comparison Total Available Spend (€)
2012	€680,780,607	59.00%	2.00%	0.00%	€292,735,661
<b>2019</b>	<b>€885,149,717</b>	<b>63.25%</b>	<b>5.00%</b>	<b>1.88%</b>	<b>€352,909,192</b>
2022	€995,544,416	61.38%	5.00%	2.44%	€409,965,191
<b>2026</b>	<b>€1,141,868,000</b>	<b>59.50%</b>	<b>5.00%</b>	<b>3.00%</b>	<b>€485,293,900</b>

Total Available Expenditure - Comparison Goods (Bulky)					
Year	Bulky Total Available Spend (€)	Bulky - Outflow (%)	Bulky - Inflow (%)	Bulky - Online (%)	Adjusted Bulky Total Available Spend (€)
2012	€170,195,152	32.20%	0.00%	0.00%	115,392,313
<b>2019</b>	<b>€221,287,429</b>	<b>56.25%</b>	<b>1.50%</b>	<b>3.00%</b>	<b>93,493,939</b>
2022	€248,886,104	54.38%	2.25%	3.00%	111,675,195
<b>2026</b>	<b>€285,467,000</b>	<b>52.50%</b>	<b>3.00%</b>	<b>3.00%</b>	<b>135,596,825</b>

## 6.5 Existing Retail Floorspace

An estimate of the existing retail floor space within County Meath was undertaken using Q4 2016 Geodirectory data<sup>31</sup>. This was then verified where possible using supplemental aerial image interpretation and random sampling via on-site visits. Only commercial units, which were not vacant in Q4 and which matched the NACE-code industrial sectors for convenience, comparison and bulky goods retail types were included. Table 16 below summarises the gross floor space area identified.

<sup>31</sup> <https://www.dataireland.ie/Services/GeoDirectory>

Table 16 Existing Floor Space Gross Area

Location	Convenience	Comparison	Bulky
Ashbourne	10,726	16,903	17,190
Dunboyne	5,481	2,419	8,829
Dunshaughlin	1,915	5,538	4,898
Enfield	2,208	1,947	1,155
Kells	7,368	7,500	2,820
Laytown-Bettystown-Mornington	2,924	2,047	486
Navan	19,157	38,276	43,941
Trim	7,920	11,798	11,892
Ratoath	2,407	3,121	405
Stamullen	372	595	-
<b>Total (Gross Area)</b>	<b>60,480</b>	<b>90,146</b>	<b>91,616</b>

A gross to net ratio adjustment was made on the basis of a 75% reduction to convenience and comparison floor space and an 85% reduction for bulky. This reflects how floor space within retail units of these types are utilised and how bulky goods retail outlets generally maximise their floor space area in comparison to the other two types. The net area figures are set out in Table 17 below.

Table 17 Existing Floor Space Net Area

Location	Convenience	Comparison	Bulky
Ashbourne	8,045	12,677	14,612
Dunboyne	4,111	1,814	7,504
Dunshaughlin	1,436	4,154	4,163
Enfield	1,656	1,460	981
Kells	5,526	5,625	2,397
Laytown-Bettystown-Mornington	2,193	1,535	413
Navan	14,368	28,707	37,350
Trim	5,940	8,849	10,108
Ratoath	1,805	2,341	345
Stamullen	279	447	-
<b>Total (Net Area)</b>	<b>45,360</b>	<b>67,609</b>	<b>77,874</b>

Tables 16 and 17 above do not take into consideration retail floor space that had been permitted but not yet constructed. The overall figures denote a large increase in the quantum of comparison and bulky goods stock in particular, from the last time retail floor space was estimated in the County (2012).

The proportion of retail stock dedicated to Bulky Goods sales in County Meath was over 40%, with comparison goods at 35% and convenience at almost 24%. This is outlined in Table 18 below.



Table 18: Existing Floor Space Gross to Net and Share of Total

Retail Goods Types	2017			
	Gross Floor Area	Net Floor Area	Net Area as a % of Gross Area	Net Area as a % of Overall Total Net Area
Convenience	60,480	<b>45,360</b>	75.00%	23.77%
Comparison - Non-Bulky	90,146	<b>67,609</b>	75.00%	35.43%
Comparison - Bulky	91,616	<b>77,874</b>	85.00%	40.81%
<b>Overall Total</b>	242,242	<b>190,843</b>	-	100.00%

Accounting for obsolescence, the existing retail floor space within the county is assumed to deplete at a rate of 0.25% per annum, resulting in the levels summarised below in Table 19. This rate of obsolescence is a conservative reflection on reported rates in market research, particularly for retail units which have not undergone renovation within the last five years.

Table 19: Existing Floor Space Net Area, Incorporating Obsolescence

Year	Convenience (m2)	Comparison - Non-Bulky (m2)	Comparison - Bulky (m2)
2017	45,360	67,609	77,874
<b>2019</b>	<b>45,133</b>	<b>67,272</b>	<b>77,485</b>
2022	44,796	66,768	76,905
<b>2026</b>	44,349	66,103	76,131

A further assessment is made on existing retail floor space to account for a nominal level of frictional vacancy. This is a reflection of the levels of vacancy required to achieve a stable market (allowing for equilibrium between retail outlets opening and closing, etc.).

Commercial vacancy in County Meath is estimated to be 10.4% in Q4 2018, well below the national average of 13.2% (Geodirectory). However, this does not discriminate between convenience, comparison, bulky or other retail types (such as restaurants and cinemas).

Therefore, in this study, capacity potential has been assessed based on existing floor space - unadjusted for vacancy, as well as after adjusting for vacancy.

Table 20 illustrates the assumed levels of frictional vacancy at 8% for convenience, 6% for comparison and 4% for bulky goods. However, these rates do not reflect total vacancy, which is not determined, but they do provide for a degree of fluidity between the retail types for the 'adjusted' capacity figures as discussed in section 6.5.

Table 20: Assumed Levels of Frictional Vacancy in County Meath Retail Stock

Year	Convenience (m2)	Comparison - Non-Bulky (m2)	Comparison - Bulky (m2)
2017	3,629 (8%)	4,057 (6%)	3,115 (4%)
<b>2019</b>	<b>3,611</b>	<b>4,036</b>	<b>3,099</b>
2022	3,584	4,006	3,076
<b>2025</b>	<b>3,557</b>	<b>3,976</b>	<b>3,053</b>
2026	3,548 (8%)	3,966 (6%)	3,045 (4%)
2028	3,530	3,946	3,030

## 6.6 Turnover of Existing Floorspace

The indicative turnover figures for 2017, as set out in Table 20 below, are an estimate of the amount of expenditure that is currently being sustained by the amount of floor space in the County.

These figures indicate that trading conditions in the convenience sector would be considered as operating at a healthy level, with a turnover ratio of €14,268 per sq.m. Comparison floor space (non-bulky) is trading at an average of €4,648 per sq.m. Both indicate a degree of overtrading.

In contrast, the existing bulky goods floor space within the County is operating at a turnover ratio of just €1,048 per sq.m, which is comparatively low for this type of retail type. This points to an over-saturation of bulky goods trading and/or significantly high outflows, resulting in a lower amount of local spend available.

Table 21: Indicative Retail Turnover by Type in 2017

Retail Goods Types	2017		
	Turnover Generated by Existing (€)	Net Floor Area	Indicative Turnover Per M <sup>2</sup> (€)
<b>Convenience</b>	€647,210,683	45,360	<b>€14,268</b>
<b>Comparison - Non-Bulky</b>	€314,276,376	67,609	<b>€4,648</b>
<b>Comparison - Bulky</b>	€81,590,982	77,874	<b>€1,048</b>
<b>Overall Total</b>	€1,043,078,041	190,843	-

These figures show the average indicative turnover per sq.m of existing floor space overall in Meath, thus they disguise significant differences in turnover for different shops. In general, multiple branches of national and international multiples are located within purpose built shopping centres or other prime locations. Prime town centre shop units will have substantially higher turnover per square metre than shops which are less well located or situated in older inefficient premises and are

operated as independents. In particular, it is likely that smaller units have substantially lower turnover per sq.m than these averages whilst the largest supermarket operators have substantially higher turnover rates per sq. metre.

It is possible to derive the turnover of existing floor space within the County by multiplying the floor space in each category by an assumed average turnover. In doing so, the result better reflects these differentiating factors.

As set out in Table 22, an assumed turnover of €12,500 per sq.m. is predicted for existing convenience floor space within the County in 2017 and €5,000 per sq.m. for comparison floor space. In addition, an average turnover of €2,000 per sq.m. is assumed for bulky goods in 2017 prices.

Table 22: Assumed Average Turnover Ratios for Existing Floor space (Healthy Trading Ratios)

Convenience	Comparison - Non-Bulky	Comparison - Bulky
€12,500	€5,000	€2,000

Data available for the turnover of retailers in Ireland is limited hence it is necessary to use estimates. The figures above are based on published retail industry data and have regard to the average turnover per sq.m. calculations as established in Annual Reports and Retail Rankings as well as the Retail Planning Guidelines. Therefore, they reflect the average turnover level retailers will require to sustain a healthy level of activity. However, they do not take into account the high levels of overtrading that have existed in many areas in recent years.

In consideration of the economic climate ahead, it is reasonable to assume a 0.5% increase per annum for convenience turnover, a 1.5% increase per annum for comparison and a 0.5% increase per annum for bulky goods. The effect of this is summarised in Table 23.

Table 23: Assumed Variable Turnover Ratios (Incorporating Levels of Growth per Annum)

Year	Convenience	Comparison - Non-Bulky	Comparison - Bulky
2017	€12,500	€5,000	€2,000
<b>2019</b>	<b>€12,625</b>	<b>€5,151</b>	<b>€2,020</b>
2022	€12,816	€5,386	€2,051
2026	€13,074	€5,717	€2,091

The turnover of existing retail floor space within the County is obtained by multiplying the existing floor space estimates (after obsolescence), as set out in Table 19, by the assumed average turnover ratios summarised in Table 22.

When adjusted, the turnover total for each retail type is as follows:

Table 24: Assumed Variable Turnover Total

Year	Convenience	Comparison - Non-Bulky	Comparison - Bulky
2017	€566,996,175	€338,045,845	€155,747,982
<b>2019</b>	<b>€569,820,489</b>	<b>€346,524,141</b>	<b>€156,523,792</b>
2022	€574,083,361	€359,641,943	€157,694,758
2026	€579,818,826	€377,910,851	€159,189,921

## 6.7 Residual Turnover Potential

This section identifies the residual turnover potential which informs the subsequent minimum additional floor space requirements over the lifetime of this retail strategy. A residual surplus or shortfall is the difference between the expenditure available and the total turnover that can be generated by the existing stock. If the difference is positive, it is a surplus, denoting a capacity potential for new floor space to capture the available spend. If the difference is negative, it is a shortfall, and denotes no potential. This indicates an over-supply or an unhealthy turnover ratio.

The residual surplus/shortfall for additional retail floor space within the County is obtained by subtracting the turnover of existing convenience, comparison and bulky goods expenditure, as set out in Table 24, from the total available expenditure as set out in Table 14. This is summarised (unadjusted by frictional vacancy) in Table 25 below.

Table 25: Floor Space Capacity Potential - Unadjusted for Frictional Vacancy

Convenience Goods Potential – Unadjusted for Frictional Vacancy					
Year	Adjusted Available Expenditure (€)	Turnover Potential of Existing Floorspace (€)	Residential Surplus/Shortfall (€)	Indicative Net Floorspace Potential (m <sup>2</sup> )	Average Annual Net Floorspace Requirement (m <sup>2</sup> )
2019	<b>€709,346,958</b>	<b>€569,820,489</b>	€139,526,469	11,051	3,684
2022	€797,641,135	€574,083,361	€223,557,774	17,444	2,907
2026	<b>€914,875,485</b>	<b>€579,818,826</b>	€335,056,659	25,628	2,562

Comparison Goods (Non-Bulky) Potential – Unadjusted for Frictional Vacancy					
Year	Adjusted Available Expenditure (€)	Turnover Potential of Existing Floorspace (€)	Residential Surplus/Shortfall (€)	Indicative Net Floorspace Potential (m <sup>2</sup> )	Average Annual Net Floorspace Requirement (m <sup>2</sup> )
2019	<b>€352,909,192</b>	<b>€346,524,141</b>	€6,385,051	1,239	413
2022	€409,965,190	€359,641,943	€50,323,247	9,343	1,557
2026	<b>€485,302,433</b>	€377,910,851	€107,391,582	18,785	1,878

Comparison Goods (Bulky) Potential – Unadjusted for Frictional Vacancy					
Year	Adjusted Available Expenditure (€)	Turnover Potential of Existing Floorspace (€)	Residential Surplus/Shortfall (€)	Indicative Net Floorspace Potential (m2)	Average Annual Net Floorspace Requirement (m2)
2019	<b>€93,493,939</b>	<b>€156,523,792</b>	-€63,029,853	-31,203	-10,401
2022	€111,675,195	€157,694,758	-€46,019,563	-22,438	-3,739
2026	<b>€135,569,825</b>	<b>€159,189,921</b>	-€23,620,096	-11,296	-1,129

When adjusted for frictional vacancy, as summarised in section 6.4, Table 26 illustrates the capacity potential for each retail type, where the frictionally vacant stock has been deducted. This enables a consideration for capacity with respect to frictional vacancy, as opposed to an assumption that one can achieve full capacity at all times.

Table 26: Floorspace Capacity Potential - Adjusted for Frictional Vacancy

Convenience Goods Potential – Adjusted for Frictional Vacancy					
Year	Indicative Net Floorspace Potential (m2)	Average Annual Net Floorspace Requirement (m2)	Estimate Frictionally Vacant Net Floorspace @8% (m2)	Adjusted Indicative Net Floorspace Potential (m2)	Average Annual Adjusted Net Floorspace Requirement (m2)
2019	<b>11,051</b>	<b>3,684</b>	3,611	7,440	2,480
2022	17,444	2,907	3,584	13,860	2,310
2026	<b>25,628</b>	<b>2,562</b>	3,548	22,080	2,208

Comparison Goods (Non-Bulky) Potential – Adjusted for Frictional Vacancy					
Year	Indicative Net Floorspace Potential (m2)	Average Annual Net Floorspace Requirement (m2)	Estimate Frictionally Vacant Net Floorspace @6% (m2)	Adjusted Indicative Net Floorspace Potential (m2)	Average Annual Adjusted Net Floorspace Requirement (m2)
2019	<b>1,239</b>	<b>413</b>	4,036	-2,797	-932
2022	9,343	1,557	4,006	5,337	890
2026	<b>18,785</b>	<b>1,878</b>	3,966	14,819	1,482

Comparison Goods (Bulky) Potential –Adjusted for Frictional Vacancy					
Year	Indicative Net Floorspace Potential (m2)	Average Annual Net Floorspace Requirement (m2)	Estimate Frictionally Vacant Net Floorspace @4% (m2)	Adjusted Indicative Net Floorspace Potential (m2)	Average Annual Adjusted Net Floorspace Requirement (m2)
2019	<b>-31,203</b>	<b>-10,401</b>	3,099	-34,302	-11,434
2022	-	-	3,076	-25,514	-2,551
	-22,438	-3,739			
2026	<b>-11,296</b>	<b>-1,129</b>	3,045	-14,341	-1,434

The floor space capacity potential/requirement is summarised in isolation in Tables 25 and 26 in section 6.7, and is provided in a final format in Table 27.

It can be seen in both tables that a capacity potential exists for convenience retail, in order to fully capture the available expenditure in any given year. Likewise the same is true of comparison goods retail from 2019. However, bulky goods retail has no capacity potential, as the available expenditure is lower than the turnover potential of existing stock throughout the period. This is due to a high level of existing stock and a low level of available expenditure and to a large degree, the consequence of a high level of outflow (67.5% in 2017).

It is important to note that the indicative net floor space potential is calculated using each year's specific inputs (stock levels, expenditure levels and total turnover), and is therefore not a representation of a cumulative total on preceding years' figures. Therefore, one should not take the difference between any two years to derive requirements between years. Rather, the latest potential should be divided by the number of years preceding it to arrive at an average annual requirement (which has been included in the tables, dividing each year's potential by the numbers of years preceding it back to 2017). This is only useful as a metric for quantifying possible delivery of such potential. In all other cases, the total identified potential capacity (if a positive number) should be taken as the operative figure (for a given year).

## 6.8 Future Retail Floorspace Requirements

In order to calculate the requirements for additional retail floor space within County Meath, the residual surplus (unmet potential turnover) should be divided by the assumed average turnover ratios per sq.m per retail category type.

Based on the application of these assumptions, the future floor space requirements for additional convenience and comparison floor space within County Meath are summarised in Table 27 below (unadjusted for frictional vacancy):

Table 27: Indicative Retail Floor space Potential - Unadjusted for Frictional Vacancy

Retail Category	2019	2022	2026
	Floor space (m2)	Floor space (m2)	Floor space (m2)
Convenience Goods	11,051	17,444	<b>25,628</b>
Comparison Goods (Non-Bulky)	1,239	9,343	<b>18,785</b>
Comparison Goods (Bulky)	-31,203	-22,438	<b>-11,296</b>

It is noted that a minimum level of operational vacancy is required for a healthy market, for example to account for ongoing refurbishments/ normal trading of units. Given that the total level (including all commercial types) of frictional vacancy was 10.4% in Quarter 4 2018 (according to the Geodirectory), the following levels of frictional vacancy were assumed for each retail category type which was estimated at 8% for convenience, 6% comparison, 4% bulky.

Factoring for the assumed levels of frictional vacancy, then the estimated requirements are as follows in Table 28:

Table 28: Indicative Retail Floor Space Potential - Adjusted for Frictional Vacancy

Retail Category	2019	2022	2026
	Floorspace (m2)	Floorspace (m2)	Floorspace (m2)
Convenience Goods	7,440	13,860	<b>22,080</b>
Comparison Goods (Non-Bulky)	--2,797	5,337	<b>14,819</b>
Comparison Goods (Bulky)	--34,302	-25,514	<b>-14,252</b>

Tables 27 and 28 exclude an assessment of retail requirements outside of the specified hierarchy settlements. Therefore, an addition of 5% onto these requirements has been incorporated into Table 29 below (for convenience goods only). This accounts for the broad additional requirement for same across the remainder of the County (with the exception of bulky goods retail, given there is an identified over-supply).

A summary of additional floor space requirements over the period to 2025 (based on unadjusted for frictional vacancy figures) is set out in Table 29 below:

Table 29: Additional Retail Floor space Requirements in County Meath in 2025

Retail Category	2026
	Total Floor space Requirement (m2)
Convenience Goods	26,909
Comparison Goods (Non-Bulky)	18,785

The Retail Planning Guidelines<sup>32</sup> advise that Retail Strategies should:

*“assess the broad requirement for additional development over the plan period... these assessments of future retail requirements are intended to provide **broad guidance** as to the additional quantum of convenience and comparison floor space provision. They should not be treated in an **overly prescriptive** manner, nor should they serve to inhibit competition”.*

For this purpose, it is not the intention of this strategy to present figures as some form of cap on retail permissions in the County, but rather to guide the general scale of overall retail provision.

In considering the potential for additional retail floor space within the County it should be noted that the floor space potential figures outlined in Table 29 above should not be considered as upper limits, merely as indicative of the scale of new floor space required to meet the needs of existing and future population and expenditure within the County. The key consideration is the location of new floor space.

### 6.9 Location of Additional Retail Floorspace

The following section outlines how the countywide additional retail floor space estimated could be allocated within County Meath. The allocations set out in Table 30 should be read as indicative guidelines rather than prescriptive figures. The following factors were considered in making indicative guidelines for allocation of countywide additional floor space potential:

- The County Settlement Hierarchy and Retail Settlement Hierarchy;
- Population growth (2011 Census to 2016) and Core Strategy Household Allocation Projections;
- Vacancy;
- Pipeline planning permissions; and
- Leakage (from settlement) indicators.

<sup>32</sup> <https://www.housing.gov.ie/sites/default/files/migrated-files/en/Publications/DevelopmentandHousing/Planning/FileDownload,30026,en.pdf>



Table 30: Distribution of Additional Retail Floor Space Requirements

Location	2026	
	Convenience Goods	Comparison Goods (non-Bulky)
Navan	4,000 – 8,806	4,000 – 6,388
Dunboyne	2,000 – 4,744	1,640 – 3,200
Ashbourne	1,000 – 1,872	1,500 – 2,100
Trim	1,000 – 1,450	1,250 – 1,750
Kells	800 – 1,250	1,000– 1,500
Enfield	1,000 – 1,450	400 – 500
Laytown-Bettystown	1,000 – 1,450	400 – 500
Dunshaughlin	1,200 – 2,322	700 - 977
Ratoath	500 – 1,545	200 - 876
Stamullen	500 – 895	200 - 226
Remainder of County	1,000 – 1,125	500 – 768
<b>Total</b>	<b>14,000 – 26,909</b>	<b>11,790 – 18,785</b>

As per national and regional planning policy, the largest settlements in the county are given primacy in the allocation of the countywide additional retail floor space potential. This is reflected through planning policies and objectives as set out in Chapter 4.

For both convenience and comparison goods retailing, Navan is the only Key Town (according to the Settlement Hierarchy in the *Regional Spatial & Economic Strategy for the Mid-Eastern region 2012 – 2022*) in County Meath to receive approximately one third of the total allocated additional retail floor space potential. Navan’s population has risen to above 30,000 residents and continues to grow at a strong rate (approximately 10% between 2011 and 2016).

Dunboyne is allocated the next largest share of potential floor space. As a Self Sustaining Growth Town, Dunboyne has grown (from 2011 to 2016) at a lower rate when compared to Navan, however it is envisaged that the settlement will grow significantly during the lifetime of the 2020-2026 Meath County Development Plan as part of the Metropolitan Area. It is noted that there is a granted planning permission for a significant quantum of convenience (completed in April 2019) and comparison retail floor space (at an advanced stage of construction-May 2019) which is likely to become available to the market in the near future. (see Table 30 for details).

The allocations shown in Table 30 for additional convenience and comparison retail floor space in Kells, Trim and Ashbourne reflect their status as ‘Self Sustaining Growth Towns’. The population

growth rate (between 2011 and 2016) for Kells is significantly lower than that of Dunboyne and Trim, therefore Kells has been allocated less than these towns. While Dunshaughlin is also designated as a Self Sustaining Growth Town, it has a lower population base in comparison to other towns in this category; however the settlement is forecast to grow significantly during the life of the plan according to the Core Strategy projections. Therefore, Dunshaughlin is allocated additional retail floor space accordingly.

There are also a number of Self Sustaining Towns identified and include Bettystown/Laytown, Ratoath and Enfield. Enfield and Laytown / Bettystown have recorded a high population growth in 2016 Census.

This is acknowledged with additional retail floor space allocations in these towns. Ratoath's large population base and low vacancy rate should be acknowledged by a higher allocation of additional convenience and comparison retail floor space potential while Stamullen is now identified as a Self Sustaining Town but will continue to operate as a village type settlement. See Section 7.1 for confirmation of the Retail Settlement Hierarchy for the 2020-2026 Meath County Development Plan.

Table 31: Extant Planning Permission 'Pipeline' (May 2019) for Retail Development

Towns	Convenience sq. m.	Comparison sq. m.	Bulky goods sq. m.
<i>Navan</i>	8,621	19,735	0
<i>Trim</i>	0	0	0
<i>Kells</i>	0	0	0
<i>Dunboyne</i>	0	620	0
<i>Ashbourne</i>	0	0	0
<i>Dunshaughlin</i>	0	0	0
<i>Enfield</i>	0	0	0
<i>Bettystown/Laytown</i>	128	0	0
<i>Stamullen</i>	100	0	0
<i>Other</i>	1,959	2,110	0
<b>Total</b>	<b>10,680</b>	<b>23,212</b>	<b>0</b>

## 7.0 Retail Planning Policies and Criteria for Assessment of retail Development

This chapter draws upon the qualitative and quantitative analysis of the preceding chapters and provides policy direction and guidance to be included in the *Meath County Development Plan 2019-2025*.

The Retail Settlement Hierarchy is confirmed to inform the direction of retail scale and type in the county. The Core Retail Areas for each of the towns within the Retail Settlement Hierarchy are mapped along with identified Retail Opportunity Sites for each town.

Following this, planning policies, objectives and criteria for assessment of retail development are provided within the Meath County Development Plan 2019-2025.

### 7.1 Retail Settlement Hierarchy

As per the *Retail Planning Guidelines* (2012), this strategy is required to confirm the Retail Settlement Hierarchy. The hierarchy remains the same as the 2013-2019 Meath County Development Plan with the exception of Ratoath, which is considered to be a Level 2 'District Centre' given its population (approximately 9,500 in 2016 Census). This is reflected in the additional floor space allocations (Table 30).

Table 32: Retail Settlement Hierarchy

Retail Settlement Type	Retail Settlements	
Level 1: Major Town and County Town Centres	Navan	Major Convenience and Comparison
Level 2: Sub-County Towns and District Centres	Dunboyne / Ashbourne / Dunshaughlin / Kells / Trim / Laytown-Bettystown / Enfield / Ratoath	Large to Medium scale convenience and medium scale comparison
Level 3: Neighbourhood Centres, Small Towns and Villages	Athboy / Ballivor / Clonee, Duleek / Kilmessan / Nobber, Oldcastle / Slane / Stamullen	Medium scale convenience along with small to medium scale comparison
Level 4: Corner Shops and Small Villages	Various	Predominantly lower order convenience, but not excluding tourism related comparison

## 7.2 Core Retail Areas and Retail Opportunity Sites Mapping

The following section includes mapping to identify ‘Core Retail Areas’ as well as ‘Retail Opportunity Sites’. For ease of reference, both are provided on the same map and followed by related planning permissions for each opportunity site.

### 7.2.1 Navan

Considering existing retail presence and immediate potential, the ‘Core Retail Area’ in Navan has been extended to the east, to include Railway Street and part of Brew’s Hill.

Nine sites have been selected within Navan Town Centre, all of which are zoned ‘to protect, provide for and / or improve town and village centre facilities and uses’. Opportunity Site 1 is a significant area of land and will provide a logical expansion to the present town centre. Development of Opportunity Site 2 would have the effect of providing an additional active frontage to the Kennedy Road Civic Plaza, as well as to Cannon Row. Opportunity site 4 is located on back lands at Cornmarket, and the development of this central site would be a significant infill of presently under-utilised land in the historic core.

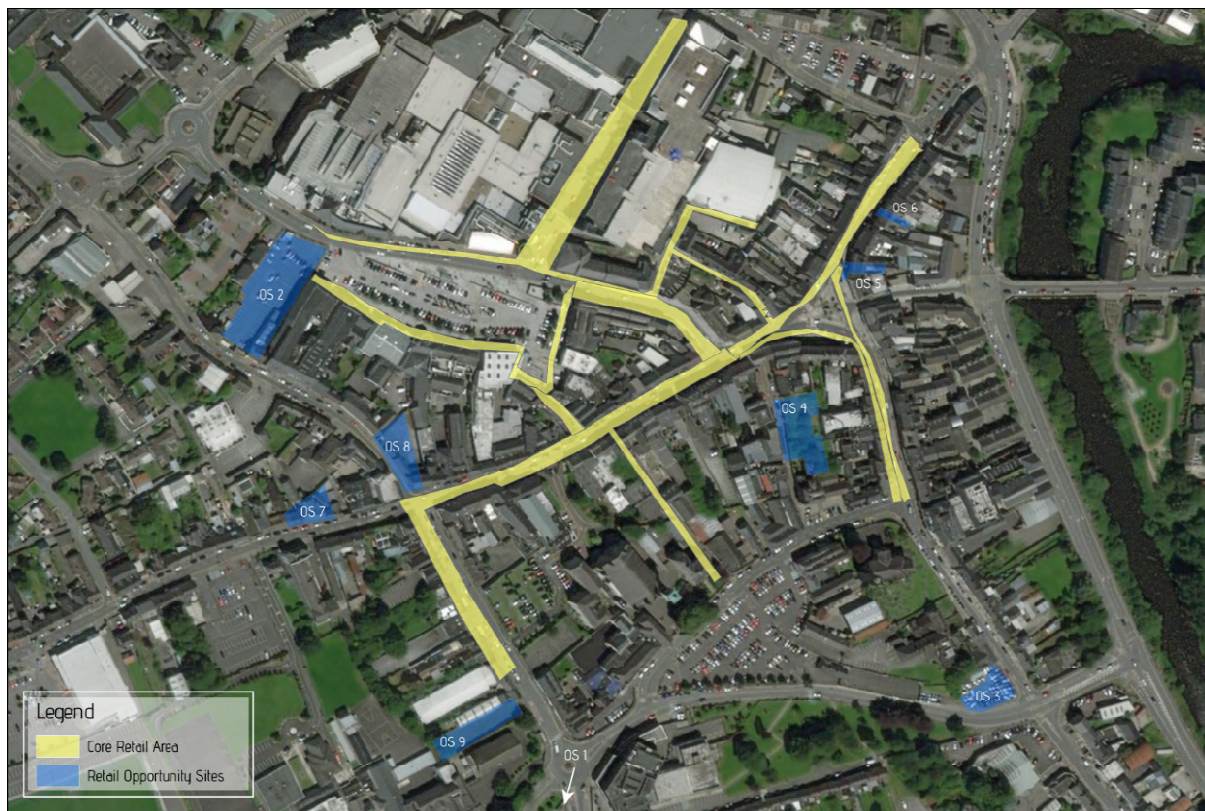


Figure 52: Retail Core Area and Opportunity Sites (minus Opportunity Site 1) in Navan

Opportunity Sites 3, 5, 6, 7 and 8 while smaller in land area, are prominent sites and their ongoing vacancy not only represents a retail opportunity, but detracts from the streetscape of the Town

Centre. The Meath Chronicle Building (OS5) is a protected structure (fronting Market Square/Watergate Street) with great historical and social value, and its retention and reuse is important for the town. Opportunity Site 5 (The Meath Chronicle Building) and Opportunity Site 6 (42 Watergate Street) are smaller town centre infill sites, which cannot provide large floorplates but can provide opportunities for retail development.



Figure 53: Opportunity Site 1 – Navan



Figure 54: Opportunity Site 2 - Navan



Figure 55: Opportunity Site 3 - Navan



Figure 56: Opportunity Site 4 – Navan



Figure 57: Opportunity Site 5 and 6 – Navan



Figure 58: Opportunity Site 7 and 8 – Navan



Figure 59: Opportunity Site 9 – Navan

### 7.2.2 Trim

Considering the existing retail presence and immediate potential, the Core Retail Area in Trim has been extended to the east to include Watergate Street, Emmett Street and Finnegans Way. It is recognised that site assembly in Trim can be difficult due to constraints associated with its historic heritage.

Trim Town Centre contains some specific areas of concentrated vacancy, the most prominent of which is at the junction of Market Street and Watergate Street. Opportunity Sites 1 and 2 (as shown on Figure 60) are both located close to this junction and present significant infill development potential within the existing historic street pattern and close to the newly constructed convenience supermarket at Watergate Street.

Opportunity Site 3 is located adjacent (to the south) the newly constructed ALDI retail convenience store on backlands on Watergate Street while Opportunity Site 4 is located on greenfield land adjacent (to the west) of the OPW offices.



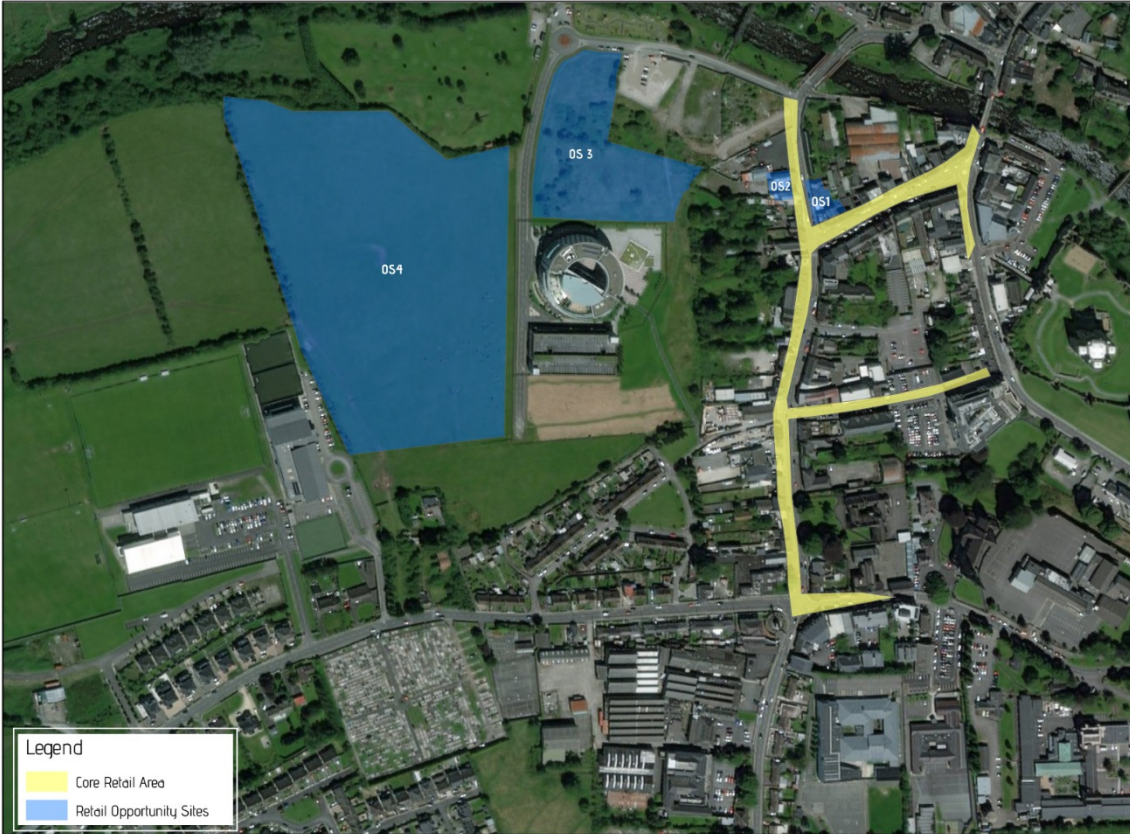


Figure 60: Core Retail Area and Retail Opportunity Sites in Trim



Figure 61: Opportunity Sites 1 and 2 – Trim

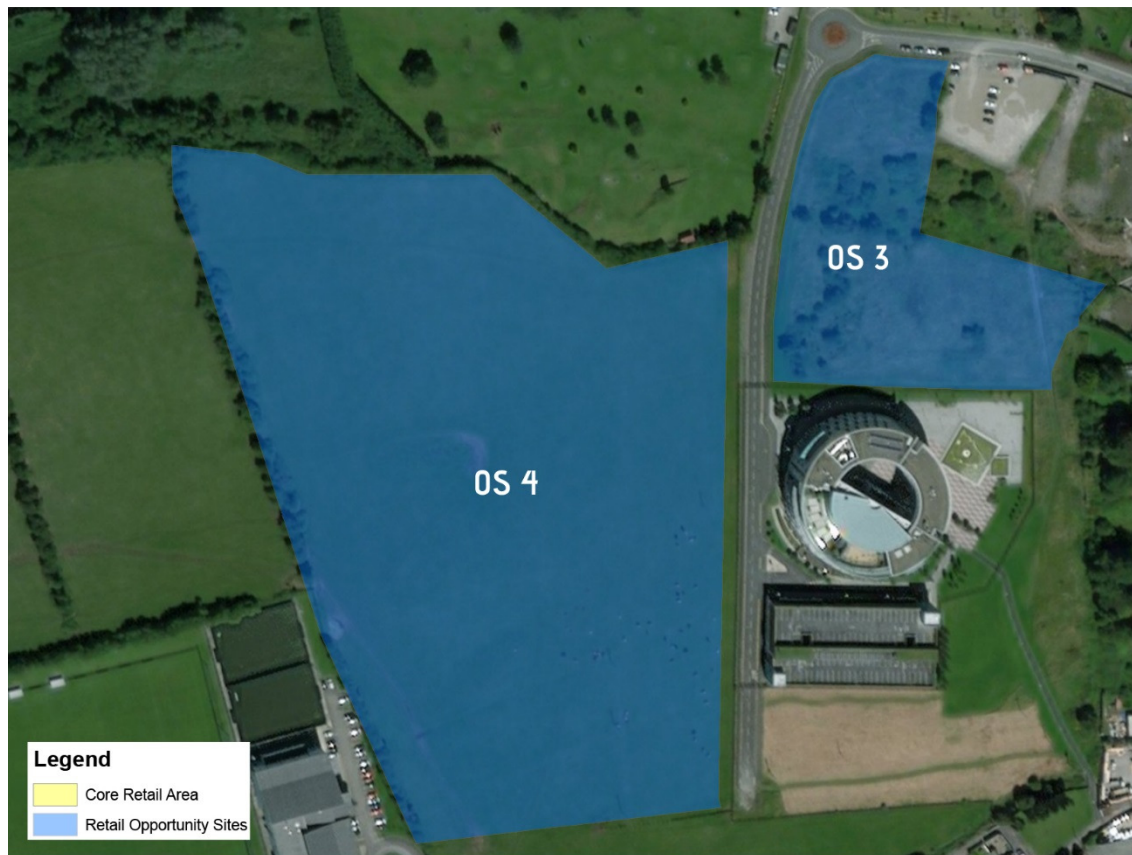


Figure 62: Opportunity Sites 3 and 4 – Trim

### 7.2.3 Kells

While the core retail area of Kells remains strong, it is recognised that site assembly in Kells can be difficult due to constraints associated with its historic heritage. The town is proactively addressing this issue with Kells being selected in 2017 as the pilot town for the Irish Walled Towns Network’s Kick Start Initiative (funded and facilitated by the Heritage Council and led by ‘Kells Local Heroes’). It is designed to provide sustainable solutions to activating the town centre while enhancing the heritage of the town.

While vacancy levels are generally low in the town centre at 13.5%, vacancy has tended to cluster in central and prominent locations within existing (often historic) buildings. This has an adverse effect on perceptions of vibrancy in the town. Opportunity Site 1 holds great potential for returning active use to both Castle Street and John Street by adaptively reusing adjoining buildings at this prominent town centre location. Retail development of Opportunity sites 2, 3, and 4 would also activate key infill sites, adding vibrancy to the town centre.



Figure 63: Retail Core Areas and Retail Opportunity Sites in Kells



Figure 64: Opportunity Site 1 – Kells

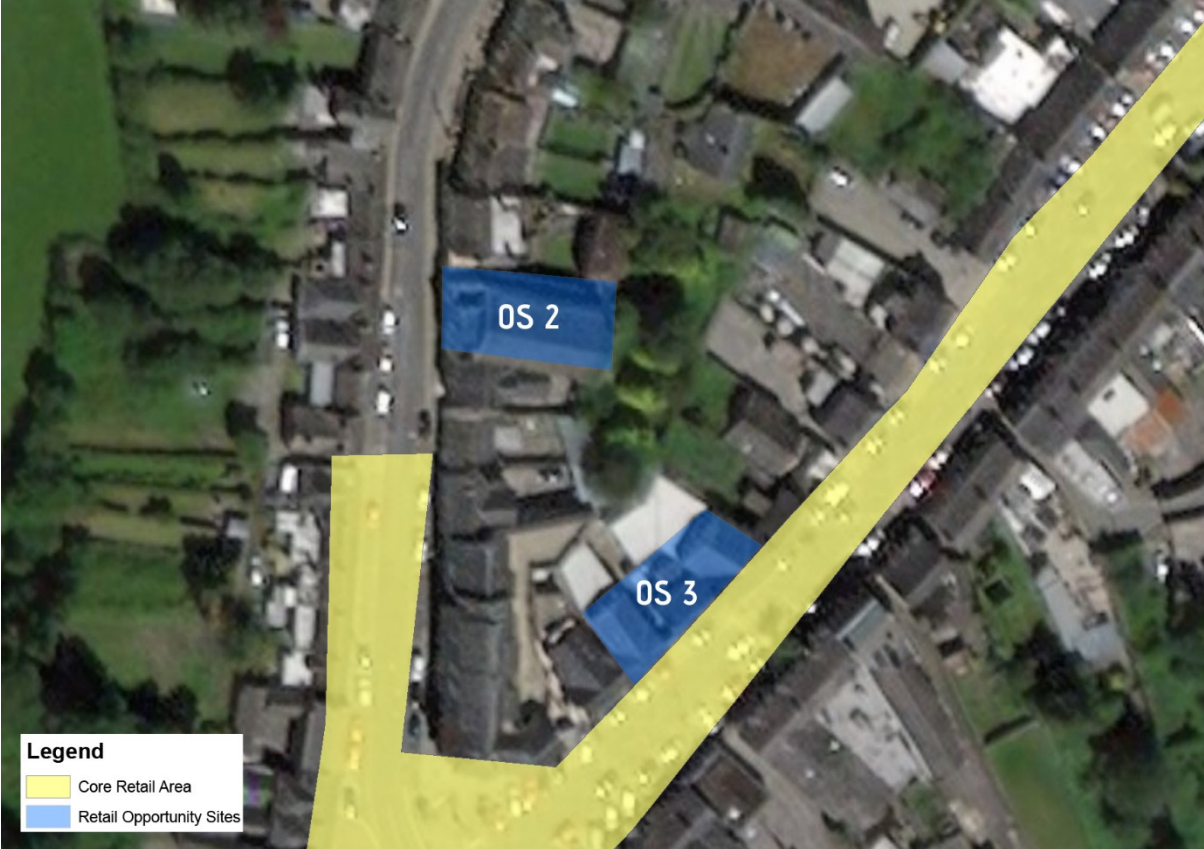


Figure 65: Opportunity Site 2 and 3 – Kells



Figure 66: Opportunity Site 4 - Kells

### 7.2.4 .Dunshaughlin

Considering existing retail presence and immediate potential, the Core Retail Area in Dunshaughlin has been extended to the north and south of the Main Street.

There are significant levels of vacant units in Dunshaughlin, inspite of this, the town contains some potential future sites for new retail floor space. Both opportunity sites 1 and 2 occupy land in the northern back lands of the town west and east of the Main Street. Opportunity Site 1 (which presently includes the Lidl convenience store). This development has provided an extension of the town centre area and provides more convenience retail floor space than previously within the town.

Regarding Opportunity Site 2, an application for planning permission that includes a substantial retail component and permitted by Meath County Council is presently being considered by An Bord Pleanála on appeal (304121-19). Opportunity site 3 is located to the south of the current retail centre of the town and is a smaller, infill type site fronting the Main Street.



Figure 67: Core Retail Area and Retail Opportunity Sites in Dunshaughlin



Figure 68: Opportunity Sites 1 and 2 - Dunshaughlin



Figure 69: Opportunity Site 3 – Dunshaughlin

### 7.2.5 .Ashbourne

Ashbourne's town centre is relatively successful with the original Main Street showing low levels of vacancy along with southern parts of High Street. Northern parts of High Street and the out of town Ashbourne Retail Park require a particular attention to address vacant units (see Ashbourne Health Check). Additional retail demand in Ashbourne could avail of Opportunity Site 1 to the north of the existing Dunnes Stores store. An extant planning permission for a residential development has commenced on Opportunity Site 1 (AA140530 – granted 03/02/15). Opportunity Sites 2 and 3 front the Milltown Road in the southern part of the town, and represent potential retail infill sites.



Figure 70: Core Retail Area and Retail Opportunity Sites in Ashbourne





Figure 71: Opportunity Site 1 - Ashbourne



Figure 72: Opportunity Sites 2 and 3 - Ashbourne

### 7.2.6 .Bettystown

Retail opportunity sites in Bettystown are limited given that there are relatively low levels of vacancy in the historic town centre. However, there is significant vacant capacity in the 'Bettystown Town Centre' development to the west.

Opportunity Site 1 lies vacant and fronts the R150 at the 'Bettystown Town Centre' site. Adjoining to the rear lies the Tesco Superstore which is presently the only retail presence at this location. Opportunity Site 2 is the site of the vacant and derelict former 'Last Straw' public house at the junction in the historic town centre. The site occupies land in the centre of the town allowing for three street frontages in this prominent location.



Figure 73: Retail Core Area and Retail Opportunity Sites in Bettystown

### 7.2.7 .Dunboyne

Considering existing retail presence and immediate potential, the Core Retail Area in Dunboyne has been extended to the northeast, to include part of Summerhill Road and to the east along the Main Street. For Dunboyne, there are low levels of vacancy to accommodate new retail development in the existing town centre.

Opportunity Site 1 is a large site with circa 2.32 hectare site, of which 0.96 hectares is zoned for residential purposes, and 1.36 hectares for Town Centre purposes. The full site is subject to an extant planning permission (DA100909 – extension of duration granted 06/10/15) for a mixed use (retail and residential) development on the full site.

There is a separate planning permission application RA160805 granted by Meath County Council 09/03/17 (granted on appeal 11/10/17 by An Bord Pleanála – PL17.248301) relating to part of the site for retail development only. A Supervalu convenience store has recently opened (April 2019) and 4 no. comparison retail units (616 sq. m. gfa) are at an advanced stage of construction. This development provides a convenience retail anchor of approximately 1390 sq m net ground floor area and additional smaller retail (comparison) units (approximately 660 sq m).



Figure 74: Core Retail Area and Retail Opportunity Site in Dunboyne

7.2.8 .Enfield

Enfield’s town centre can accommodate additional retail development at a number of locations fronting its Main Street. Opportunity Site 1 is located in the west of the town centre at an existing brownfield site partly occupied by agricultural sheds and has the potential for medium to large scale retail/ residential development. Opportunity Site 2 is located to the west of the existing Supervalu store and extends to the residential land to the north.

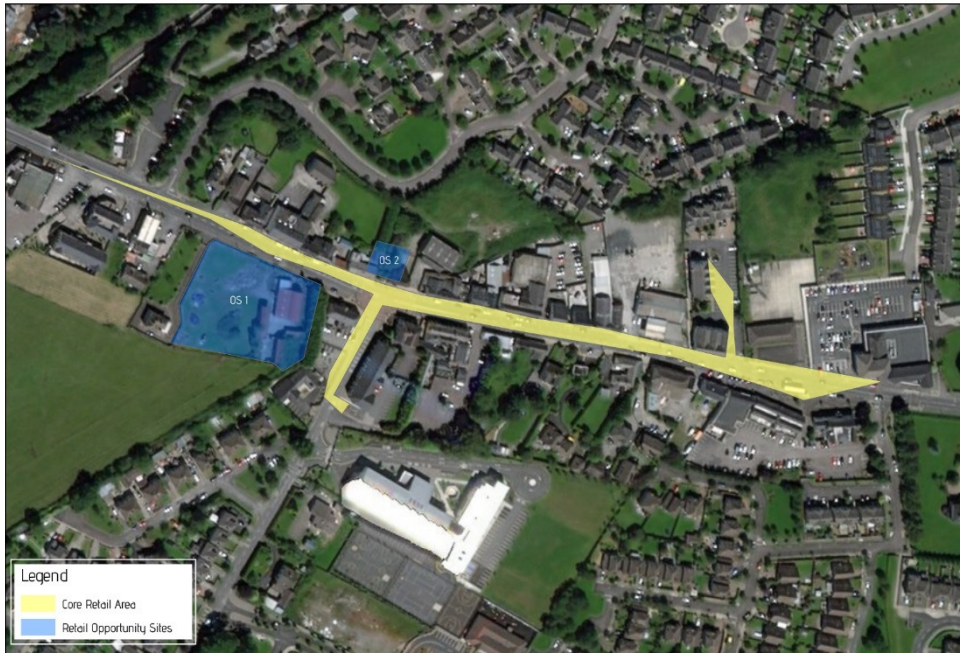


Figure 75: Core Retail Area and Retail Opportunity Sites in Enfield



Figure 76: Opportunity Sites 1 and 2 – Enfield

### 7.2.9 .Ratoath

Opportunity Site 1 for Ratoath is a prime Main Street infill site located in the centre of the town centre adjoining the Ratoath Community Centre.



Figure 77: Core Retail Area and Retail Opportunity site in Ratoath

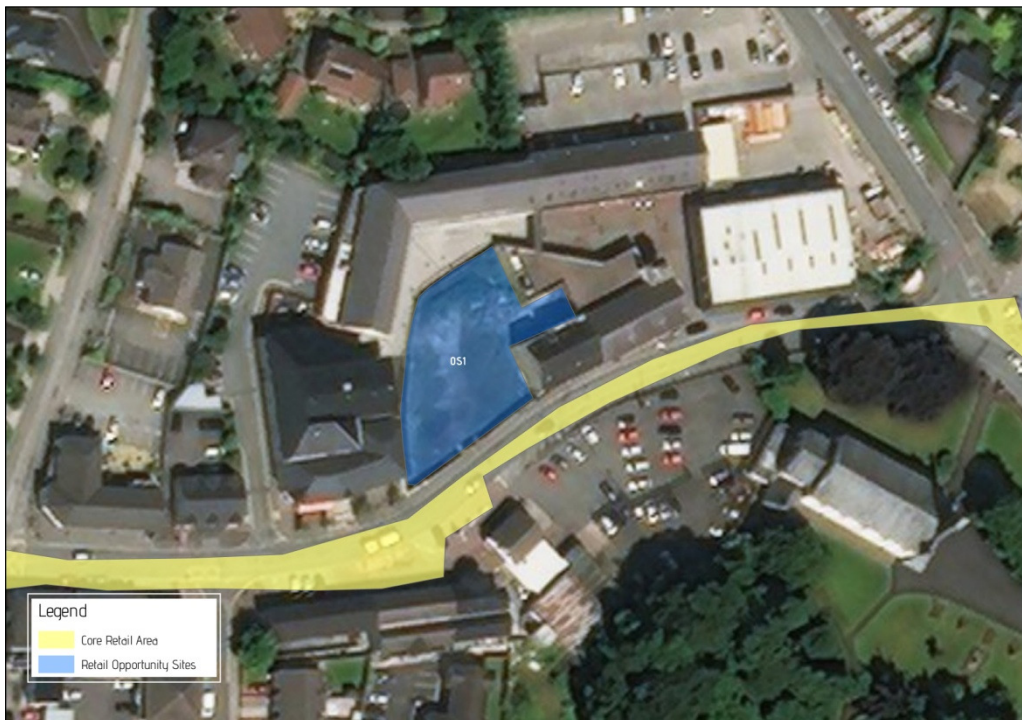


Figure 78: Opportunity Site 1 - Ratoath

### 7.2.10 .Stamullen

Stamullen's zoned town centre lands are extensive relative to the extent of town centre use presently constructed. In this way there are many retail opportunity sites in the town. Opportunity Site 1 and Opportunity Site 2 are both on lands to the east of the Main Street and would represent a natural extension to the existing built form of the town centre.



Figure 79: Core Retail Area and Retail Opportunity Sites in Stamullen

## 7.3 Planning Policies, Objectives and Criteria for Assessment of Retail Development

### 7.3.1 .General Policies and Objectives

The Retail Strategy identifies a number of general policies which are intended to shape and guide retailing in the County over the period of the County Development Plan and beyond.

#### **Policies**

It is the policy of Meath County Council:

- To implement the *Meath County Retail Strategy 2020 - 2026*.
- To promote and encourage Navan to sustain its competitiveness and importance as a Primary Economic Growth Town in the Greater Dublin Area.
- To support the vitality and viability of all retail settlement centres and facilitate a competitive and healthy environment for the retailing industry into the future by ensuring that future growth in retail floor space responds to the identified retail settlement hierarchy.
- To support the development of Core Retail Areas in each of the retail settlement centres as identified by the *County Meath Retail Strategy 2020-2026*, and reinforce the role and function of the Core Retail Areas.
- To adhere to the Sequential Approach principle in the consideration of retail applications located outside of core retail areas.
- To have regard to the policies and objectives of the Regional Spatial and Economic Strategy of the Eastern and Midland Regional Authority.

#### **Objectives**

It is an objective of Meath County Council:

To implement the following specific objectives for County Meath as identified within the County Retail Strategy, to ensure the continued vitality and viability of town centres are as follows: :

- Facilitate the development of key opportunity sites as identified in all existing retail centres by the *County Meath Retail Strategy 2020-2026*;
- Promote the reuse or reactivation of vacant and derelict properties/shop units;
- Encourage infill retail developments and the redevelopment of derelict and obsolete sites in all existing Core Retail Areas;
- Promote ongoing environmental, amenity and recreation improvements to the public realm, including private vehicle use in all existing Core Retail Areas;
- Encourage a healthy diversity of retail types and scales, as well as uses that are complementary to retail, in particular leisure uses, within all Core Retail Areas;
- Support all existing retail business in Core Retail Areas to establish an online sales platform; and
- Promote on-street activities including festivals, events, street markets and farmer's/country markets in all existing retail centres.

### 7.3.2 .Criteria for Assessment of Retail Development

In accordance with the ‘Retail Planning Guidelines for Planning Authorities’ (April 2012) requirements, all applications for significant development should be assessed against the criteria as set out below.

#### The Sequential Test

All applications for retail developments at edge-of-centre or out-of-centre locations will be subject to the sequential test, where the following applies:

The Retail Planning Guidelines state:

*the order of priority for the sequential approach is to locate retail development in the city/town centre (and district centre if appropriate), and only to allow retail development in edge-of-centre or out-of-centre locations where all other options have been exhausted. Where retail development in an edge-of-centre site is being proposed, only where the applicant can demonstrate **and** the planning authority is satisfied that there are no sites or potential sites including vacant units within a city or town centre or within a designated district centre that are (a) **suitable** (b) **available** and (c) **viable**, can that edge-of-centre site be considered.*

*Where retail development on an out-of-centre site is being proposed, only in exceptional circumstances where the applicant can demonstrate **and** the planning authority is satisfied that there are no sites or potential sites either within the centre of a city, town or designated district centre or on the edge of the city/town/district centre that are (a) **suitable** (b) **available** and (c) **viable**, can that out-of-centre site be considered.*

#### Retail Impact Assessments

Retail Impact Assessments will be required for significant retail development where due to its scale and/or location, it may impact on the vitality and viability of centres. These assessments will be prepared in accordance with the current Retail Planning Guidelines, which requires an applicant to address the following criteria and demonstrate whether or not the proposal would:

- Support the long-term strategy for city/town centres as established in the development plan, and not materially diminish the prospect of attracting private sector investment into one or more such centres;
- Have the potential to increase employment opportunities and promote economic regeneration;
- Have the potential to increase competition within the area and thereby attract further consumers to the area;
- Respond to consumer demand for its retail offering and not diminish the range of activities and services that a centre can support;
- Cause an adverse impact on one or more centres, either singly or cumulatively with recent developments or other outstanding planning permissions (which have a realistic prospect of implementation) sufficient to undermine the quality of the centre or its wider function in the promotion and encouragement of the arts, culture, leisure, public realm function of the town centre critical to the economic and social life of the community;



- Cause an increase in the number of vacant properties in the primary retail area that is likely to persist in the long term;
- Ensure a high standard of access both by public transport, foot and private car so that the proposal is easily accessible by all sections of society; and/or
- Link effectively with an existing city/town centre so that there is likely to be commercial synergy.

### **Traffic and Transport Assessments**

A Traffic and Transport Assessment (TTA) may be required for retail developments over a particular threshold (100sqm), as set out in the *Traffic Management Guidelines 2003*, and the *Traffic Transport Assessment Guidelines 2014*.

A TTA must examine the transport impacts of a proposed development, incorporating any subsequent measures necessary to ensure roads, junctions and other transport infrastructure in the vicinity of the development are adequate to accommodate the proposed development without causing additional delays to existing and future road based traffic. More importantly, TTA is important in demonstrating how to encourage a shift towards sustainable travel modes by those using the retail development in question.

### **Design Quality**

The Retail Planning Guidelines (2012) are accompanied by the Retail Design Manual (April 2012). The Manual provides planning authorities, developers and designers with evidence based quality principles to ensure that future planning for the retail sector is focussed on the creation of vibrant, quality places. Meath County Council will seek to promote quality design in all retail developments supported by the necessary policy frameworks. This is of particular importance due to the visually dominant role retail plays in a town or village streetscape. Section 11.23 of Development Management Guidelines and Standards of the Plan provides guidance on Retail Development whilst individual Town Development Plans and Local Areas Plans include a range of design principles and policies which respond to local circumstances. It is essential that the following issues are also addressed:

- Visual Integration – this relates to the integration of retail developments, including their car parking requirements, into streetscapes and roofscapes at town or village level. This is of particular importance for Architectural Conservation Areas, historic areas, protected structures or areas which have a fine grained building pattern.
- Access and Mobility – this relates to all modes of transport including goods vehicles, workers, customers, tourists, cyclists, pedestrians, etc. The County Development Plan includes policies which encourage and facilitate the greater use of public transport where it is available and encourage greater pedestrian and cycling usage through appropriate linkages to other parts of the town or village.
- Use Integration – This seeks to integrate large scale retail developments with other appropriate uses which may include office, leisure, community and residential use.

## Criteria for Assessment of Different Development Types

### Large Convenience Stores

The Retail Planning Guidelines set a 3,000sqm retail floor space cap on food store development outside the four Dublin Authority areas, and the cities of Cork, Limerick/Shannon, Galway and Waterford. This strategy absorbs this requirement, which applies to new stores as well as to extensions to existing retail premises.

### Retail Parks and Retail Warehouses

Retail warehouse complexes generally comprise an agglomeration of retail warehouses grouped around a common car park selling mainly bulky household goods. There is an expectation that most of the goods purchased can be transported off-site by the customer and because of this they are generally located on the edge or outside of the built-up urban area.

The key consideration in determining the distribution of floorspace is defining the appropriate and sustainable location for such retail activities. In accordance with the Retail Planning Guidelines there should be a presumption against the further development of out of town retail parks and a preference for sites in or adjacent to town centres to ensure the potential for linked trips and commercial synergy. Key criteria for the assessment of retail warehouse applications include scale and design of the development, appropriate vehicular access and the quantitative need for such development. The Retail Planning Guidelines state that individual retail units should not be less than 700sq.m and not more than 6,000sq.m in size. These figures are gross floor area that include storage and garden centres. It is essential that the range of goods sold is restricted by planning condition to bulky household items as those defined within the RPGs such as household appliances, furniture and furnishings. The proportion of non bulky goods should be limited to 20% of the not truly 'bulky' goods and should be clearly delineated on the planning application drawings.

### Local Shops

Local shops play a vital role in catering for the daily or causal needs of nearby residents or of those passing by. Primarily convenience outlets, local shops provide a readily accessible service for basic goods, especially for the less mobile members of communities.

Where appropriate, local shops shall be recognised in the relevant parts of the Development Plan with ample provision for the establishment of other neighbourhood shops and services and made in the zoning of additional land for residential development, where necessary.

### Retailing and Motor Fuel Stations

Local shops attached to petrol filling stations are a growing sector of the retail market. However, the size of the shop associated with any petrol filling station should take account of the fact that large shops can attract additional custom, large numbers of cars can cause disruption and the preferred location for retailing is in town centres. The Retail Planning Guidelines state that when the size of such retail units is in excess of 100sqm the sequential approach should apply.

## Monitoring and Review

The Retail Planning Guidelines advise planning authorities to regularly monitor trends in their areas, and update retail policies as appropriate. Recognising that the retail sector is one of the most dynamic sectors in the economy and that related trends, influences and information can change over time, the Council is committed to monitoring the contents of this strategy to ensure that:

- I. The Retail Strategy and its baseline data are kept as up to date as possible;
- II. Mechanisms that are in place to monitor the progress of the strategy are appropriate and fit for purposes; and
- III. The Council can intervene in a positive and timely manner to address changing circumstances, as necessary.