Socio-economic Study for a Strategic Housing Development at Drumree Road, Dunshaughlin

On behalf of Castlethorn

Future Analytics
Planning | Research | Economics

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Executive Summary

Future Analytics Consulting Ltd (FAC) has prepared this Socio-Economic report on behalf of Castlethorn, to support their planning proposals for a residential development in Dunshaughlin. This report describes the socio-economic characteristics of Dunshaughlin, alongside a review of planning pipeline activity for housing. As a result, an assessment is provided in relation to the appropriateness of the application site for housing delivery at this time, in accordance with policy objectives in both local and national planning policy frameworks.

The evidence presented indicates a population within Dunshaughlin that is primarily characterised by a strong labour force with good access to employment opportunities both locally and within a wider catchment area surrounding the settlement.

It has been shown that Dunshaughlin has the capacity to support further delivery of housing, beyond the build out of the extant planning permissions. This is considered alongside the characteristics of the application site itself, which is strategically positioned on the edge of the existing settlement area and immediately adjacent to strategically important lands zoned for enterprise.

As a result, it is considered that delivery of housing across the site area would fulfil the objectives for sustainable growth as described in both the Draft Development Plan, Regional Spatial Economic Strategy (RSES) and the National Planning Framework (NPF), and deliver much needed housing to meet the increasing demands of a challenging housing market, thereby enabling Dunshaughlin to grow in a sustainable manner that will attract further investment.

1. Introduction

Future Analytics Consulting Ltd. (FAC) has been appointed by Castlethorn to prepare an evidence base that will support their Strategic Housing Development (SHD) planning application in Dunshaughlin, Co. Meath. The planning application relates to the construction of 429 no. residential units and all associated infrastructure. This report describes the reasoned justification and evidence that has led to the conclusion that housing delivery is required on the site.

This assessment describes the socio-economic characteristics of Dunshaughlin, with a detailed breakdown of population characteristics, including projected population growth. It also provides a summary overview of all relevant statutory policies and documents that inform the planning process, along with an analysis of pipeline developments in the area.

1.1 Site Location

The site for the proposed development is located along the Drumree Road which extends to the north-west of Dunshaughlin town centre, where the Drumree Road intersects with the R125. Access to the M3 motorway is provided via junction 6, which lies immediately south of the site, ensuring the site has excellent accessibility to the motorway network. The proposed development is located on greenfield sites that lie directly adjacent to a residential site currently under construction and also being developed by Castlethorn. Dunshauglin GAA have playing pitches and associated facilities bordering the eastern edge of the site, whereas the R125 borders the site to its west. Figure 1 provides an illustration of the site location.

Figure 1. Location of proposed development

1.2 Proposed Development

Castlethorn are currently constructing a 142-unit development on the Drumree Road, Dunshaughlin (called Dún Ríoga). The development now being proposed is for a further 429 units and is located immediately adjacent to the current development.

The proposed development consists of 429 no. units with the following unit mix:

- 258 no. Houses
    - 182 no. three bed units
    - 76 no. four bed units
- 62 no. Duplexes
    - 35 no. two bed units
    - 27 no. three bed units
- 109 no. Apartments
    - 38 no. one bed units
    - 71 no. two bed units

The planning application will also include all associated and ancillary site development works, infrastructural works, hard and soft landscaping and boundary treatment works. This will include:

- 749 no. car parking spaces (471 no. house spaces, 229 no. Apartment/Duplex spaces, 43 no. Visitor spaces and 6 no. creche spaces).
- 417 no. bicycle spaces (331 no. Apartment/Duplex spaces and 86 no. Visitor spaces).
- SuDS infrastructure.
- Bin stores.
- 2 no. ESB Sub-stations.

2. Policy Context

2.1 National Policy

the ***National Planning Framework*** (NPF) is Ireland's main strategic planning document that aims to steer the direction of the country's future growth and development. The NPF informs all other planning and economic development documents that are prepared at regional and county levels. Documents such as County Development Plans and Regional Assembly strategies must be cognisant of the main aims the NPF provides. As a high-level strategic document there is little direct guidance on local issues, however it is still worth nothing some of the core principles of the NPF which should be considered in the context of the future growth of Dunshaughlin.

Figure 2. National Strategic Outcomes, National Planning Framework

The NPF is structured around ten core principles which it names as its 'National Strategic Outcomes'. These outcomes, as seen in Figure 2, act as a guide for a particular type of growth and development, as envisaged by the Irish Government. In relation to the proposed residential development in Dunshaughlin, the following key outcomes are, it is argued, the most relevant and worthy of further discussion:

- **Compact Growth** – This is a call for a more *''streamlined and coordinated approach''* to the development of lands within and around our urban settlements. Sustainable growth will require effort to minimise the levels of urban sprawl that take place. This means greater emphasis on developing backlands, brownfields and other underused or vacant sites and buildings within our cities, towns and villages. Sites, such as the lands that are subject to the proposed development, which are located within the urban footprint of a settlement adhere to the aims of this NSO.

- **Strengthened Rural Economies and Communities** – Although Dunshaughlin is a relatively short distance from Dublin, it does display many characteristics of a typical rural Irish town. It is an objective of the NPF to ensure that all rural communities are provided the opportunities to improve their economies, accessibility, broadband and environment, in order to make them

an attractive place to live for future generations. As will be detailed in later sections, Dunshaughlin has a substantial commuter population. Strengthening its economy will enable the town to retain more of these commuters, which will in turn strengthen the community.

- **Sustainable Mobility** – The NPF establishes the need to transition away from the use of private vehicles powered by combustion engines to more sustainable modes of transport. The damage to our environment that has been caused by private vehicles is now quite evident, therefore the NPF places an emphasis on utilising less carbon-intensive modes where possible, but also promoting the use of active modes such as cycling and walking. Furthermore, by building communities near existing, or potential future transport nodes, a critical mass of public transport users can be created, reducing the reliance on cars. The proposed development would help contribute towards the development of a critical mass in Dunshaughlin, facilitating the development of the Dublin-Navan rail line.

- **A Strong Economy Supported by Enterprise, Innovation and Skills** – This is a call for the creation of places that facilitate enterprise and innovations and are attractive to talent and investment. It can relate to regional-level drivers, but also smaller settlements, such as Dunshaughlin. The town already possesses a strong employment base but has the potential to become more self-sustaining and expand its business and enterprise activity. Doing so will also require the development of residential properties to attract future employees.

2.2 Regional Policy

Ireland has three regional assemblies that form the second layer of government in the country, between national government and local authorities. These newly formed Assemblies have recently produced ***Regional Spatial and Economic Strategies*** (RSES) for their respective regions, which translate the guidance and aims of the NPF to a regional level. The **Eastern and Midlands Regional Assembly** (EMRA) cover the wider Metropolitan Dublin region and surrounding counties, which include Meath. Indeed, parts of Meath are within the metropolitan catchment identified in the RSES.

Three key principles underpin the entire strategy and should guide how it is understood:

- **Healthy placemaking** to promote quality of life through the creation of healthy and attractive places;

- **Climate action** efforts that seek to enhance climate resilience and accelerate transition to a low carbon society;

- **Economic opportunity** for the region, where the right conditions for sustainable economic growth and quality jobs are met, ensuring a good living standard for all.

The RSES also has 16 Regional Strategic Outcomes (RSO) which are closely aligned with the NPF. Figure 3 is extracted from the RSES and shows all of the RSOs that are the foundations of the strategy. Many of these RSOs are of relevance to the future development of towns such as Dunshaughlin, however it is the three underlying principles, as discussed previously, that are key.

A majority of County Meath, including Dunshaughlin, is found within what is termed the 'Core Region' of the Assembly area. Within the Core Region, Navan is identified as a 'Key Town' that will be the focus for economic development and population growth, enabling it to become a sub-regional driver. The growth of Navan and the continued development of Dublin Metropolitan region will place additional demands on towns such as Dunshaughlin, located between the two. It will be essential that Dunshaughlin has the appropriate infrastructure to cope with these demands.

Furthermore, a number of key transport infrastructure investments in the Assembly region are identified, one of which could have significant benefits for the future sustainable growth and development of Dunshaughlin. The reappraisal of the extension of the Dunboyne/M3 Parkway line to Navan is noted as an objective that is set to take place during the mid-term review of the Greater Dublin Area Transport Strategy. An appraisal of such a strategic transport infrastructure project will inevitably seek to establish whether the required critical mass of population exists to support such an investment.

The preferred route alignment for the Dublin to Navan rail corridor will follow the original rail route, which will pass to the west of Dunshaughlin town. A rail station for Dunshaughlin is proposed in a location that is in close proximity to those lands that are the subject of this study. The rationale and case for developing the rail line extension and rail station will be further justified if a critical mass of potential users exists and this can only occur if an increase in residential developments are allowed, such as that proposed by Castlethorn. Such a development would deliver a substantial number of residential units in a location that is close to the proposed rail corridor and station, thereby enabling residents to utilise this sustainable transport mode.

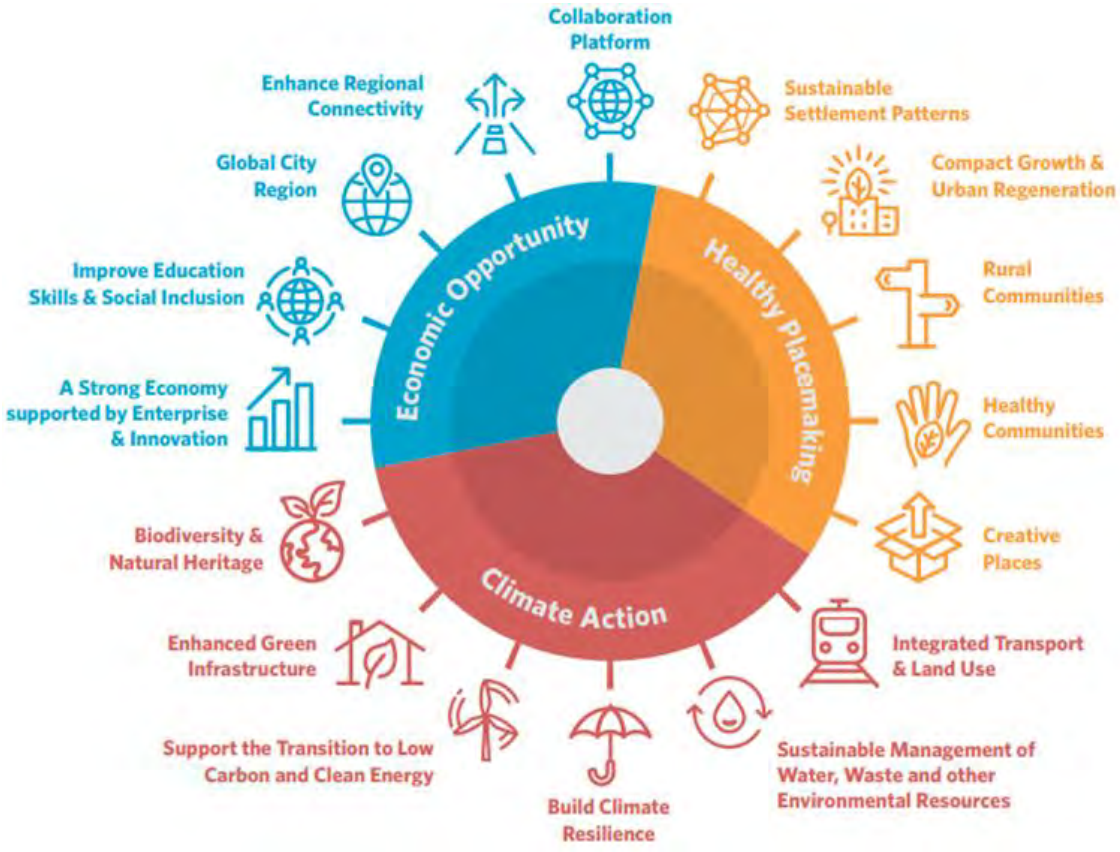

Figure 3, Regional Strategic Outcomes, EMRA RSES

2.3 County Development Plan

2.3.1 Meath Draft County Development Plan 2020-2026

The Draft Meath County Development Plan 2020 - 2026 was prepared and published in late 2019 and open for submissions from the public for a designated period subsequent to release. The Draft County Development Plan (DCDP) sets out a vision for the county and the core principles that underline the

development strategies proposed within. It is guided by higher-level policy documents such as the National Planning Framework (NPF) and Regional Spatial and Economic Strategy (RSES).

Figure 4 is the core strategy map from the DCDP and highlights the strategically important location of Dunshaughlin, which is located along the M3 and a proposed future commuter line. It is also in close proximity to the Dublin Metropolitan region. Continued future growth and development of Dunshaughlin is envisaged by Meath County Council and supported by the settlement hierarchy contained within the document.

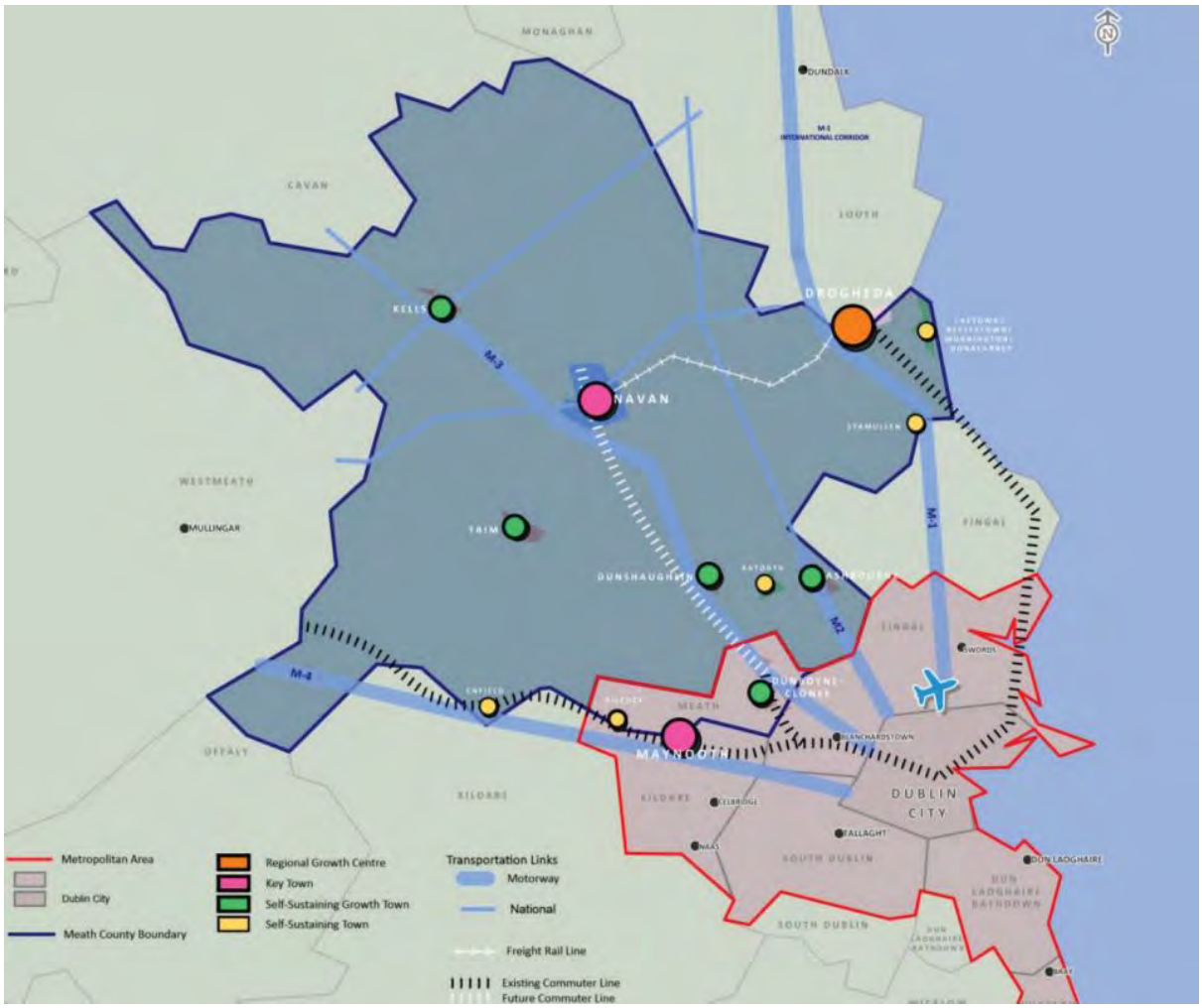

Figure 4. Settlement Strategy Map, Draft County Development Plan

The settlement hierarchy for Meath places Dunshaughlin on the third tier as a 'self-sustaining growth town' which are described as ''*towns with a moderate level of jobs and services – [and] includes sub-county market towns and commuter towns with good transport links and capacity for continued commensurate growth to become more Self-Sustaining*''. Consolidating and providing employment opportunities in tandem with population growth will be a priority in towns such as Dunshaughlin as this enables self-sufficiency.

It is a key objective of the DCDP to reduce the volume of outbound commuting that occurs. Meath has a resident workforce of 82,605 persons and 41,757 recorded jobs, which gives a Jobs to Resident Workforce ratio of 0.505. This ratio confirms the high proportion of outbound commuting for employment that exists in the County.

Table 1 provides an overview of the jobs to resident workforce ratios and figures for the County, the Ratoath Municipal District and for Dunshaughlin. Ratoath Municipal District (MD) records a ratio of

0.40, which means that the total number of jobs recorded in the MD amounts to 40% of the area's total resident workforce, implying a majority of the workforce commute to other areas. Dunshaughlin fares better, with a ratio of 0.54, indicating there are fewer outbound commuters, proportionally, when compared to both the MD and County. Nonetheless, there is still a significant proportion of workers resident in Dunshaughlin who must travel out of the town for work each day.

Table 1. Jobs to resident workers ratio

Area	Resident Workers	Total Jobs	Ratio Jobs to Workers
County Meath	82,605	41,757	0.505
Ratoath MD	15,094	6,052	0.40
Dunshaughlin	1,841	998	0.54

2.3.1.1 Population and Housing

Population growth is estimated within the DCDP, utilising the transitional figures provided in the RSES. The DCDP argues that between the period of 2016 to 2026 the population of Meath will increase by 16.5% annually, which is approximately 3,246 persons each year and would result in a 2026 population of approximately 227,500. Catering for this increasing population requires an understanding of the existing housing stock and future demand.

The DCDP attempts to project housing demand up to 2026 and one of its underlying assumptions is that the average occupancy rate will decrease from 3 persons in 2016 to 2.5 persons by 2026. Based on this assumption and the projected population to 2026, the total housing stock would be 91,000 units. This would require an additional 20,351 residential units to be delivered over the 10-year period, an average annual output of 2,035 units. It is proposed that brownfield sites throughout the County could support 6,272 units, while greenfield sites would cater for a further 14,079 units.

Table 2 is derived from information contained in the DCDP and shows the projected population, extant unbuilt residential units and household allocation for Dunshaughlin. The DCDP projects an increase of 2,200 persons in Dunshaughlin by 2026, which is a significant level of growth for a town of this size. If this projection is accurate, Dunshaughlin can expect to see over a 50% increase in its population across a ten-year period.

Table 2. Population and housing allocations, Draft Development Plan

2016 Population	2026 Projected Population	Extant Unbuilt Units	Household Allocation 20-26	Zoned Residential Lands (HA)
4,035	6,235	1,156[1]	1,003	32.8

Major recent investment in water and waste-water infrastructure has benefited Dunshaughlin, enabling the town to support a vision for long-term growth. This, combined with excellent road-links to Dublin and its position along the proposed route of Phase 2 of the Dublin to Navan rail line, ensures that Dunshaughlin has sufficient capacity to grow. Indeed, future growth is important if the proposed rail line between Dublin and Navan is to be completed, as such a service would require the critical mass to warrant development.

2.3.1.2 Zoning and Phasing

The lands that are set to accommodate the proposed residential development are split across multiple sites. The smaller site is located northwest of the Drumree Road roundabout, while the larger site is located southeast of the roundabout, running adjacent to the R125 road. In the DCDP zoning

[1] Under a Strategic Housing Development application permission was granted for 913 units. This is a 10-year permission where it is envisaged the lands will be developed across multiple Development Plans. Taking this into account 600 (two-thirds) of the 913 units have been included in the Household allocation during this DCDP.

objectives map (Fig. 5) the smaller site lies outside of the Dunshaughlin settlement boundary and, as a result, does not have any zoning objectives. The larger site is zoned 'A2 – New Residential' and has a designated specific objective for 'Residential Phasing: A2 Phasing – Residential land not available for development until post 2026'.

The zonings and objectives on the lands that comprise the proposed development sites have been proposed as part of the DCDP, but as will be highlighted in a subsequent section, run contrary to the zonings of previous Development Plans. The de-zoning of residential land and restrictions placed on land, in terms of phasing, could prove damaging to Dunshaughlin's social and economic growth.

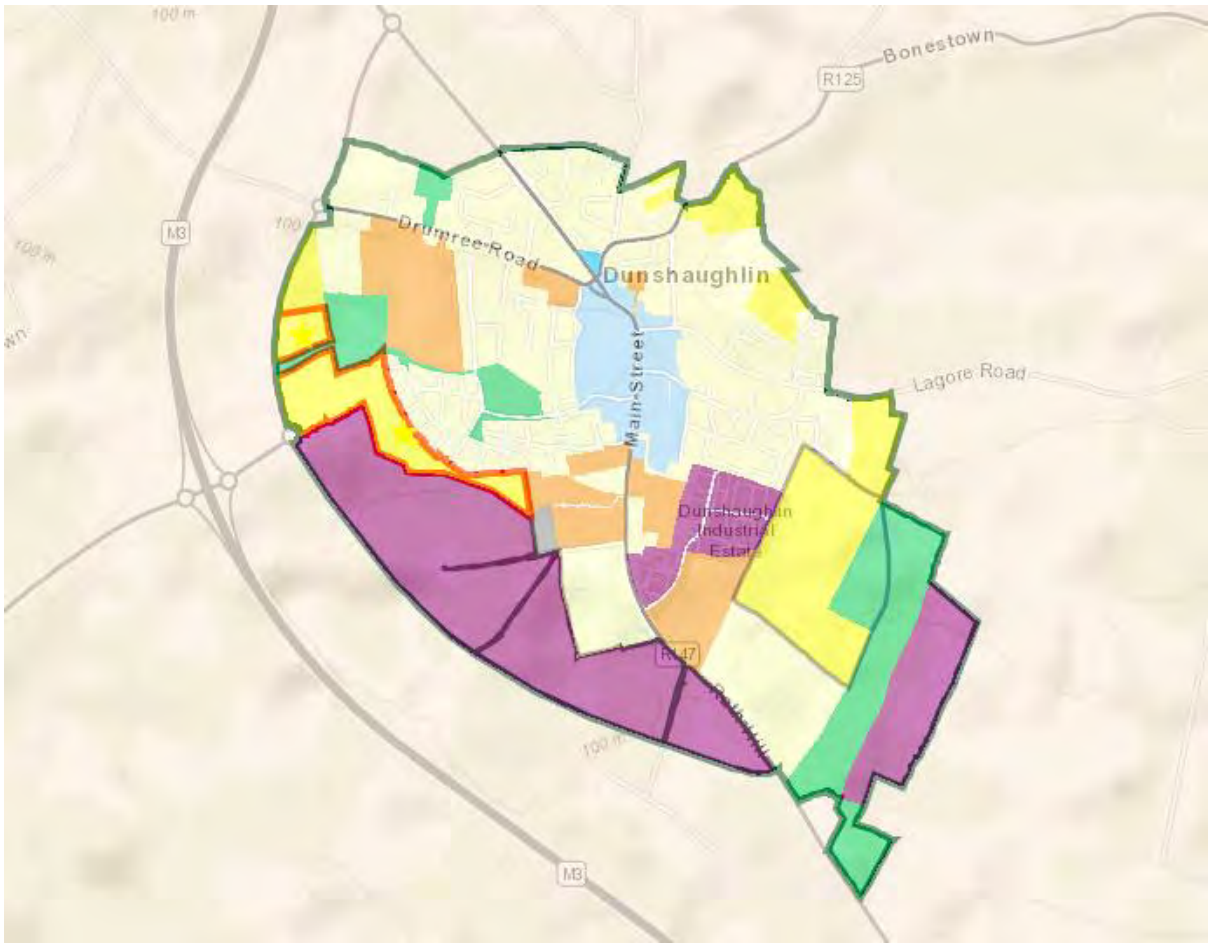

Figure 5. Dunshaughlin Zoning Objectives, Draft Development Plan

The DCDP has included a reserve of residential lands, in certain identified settlements, that will not be available for development until after 2026. There are reserved residential lands in Dunshaughlin which have been reserved in order to ''*demonstrate the town has the capacity to accommodate a critical mass of population associated with a rail link delivered as part of Phase II of the Navan Rail Project*''.

While the DCDP acknowledges that Dunshaughlin is *''one of the most active settlements in the County for household construction''* and that this construction is *''meeting the pent up demand in the County''*, it has decided to focus on the completion of existing developments, with particular emphasis placed on the 'Willows' SHD located to the south-east of the town centre. This SHD has a 10-year permission granted which, the Council conclude, will see construction occur across multiple Development Plans. As a result, they have factored the phased delivery of this housing stock into their overall assessment of Dunshaughlin's housing requirement.

2.3.2 Meath County Development Plan 2013-2019

Although a Draft Development Plan has been prepared by Meath County Council, until such a time as this is adopted the previous County Development Plan for the period 2013-2019 retains its statutory dominance. The County Development Plan (CDP) for 2013-2019 designates Dunshaughlin as a tier 3 'Moderate Sustainable Growth Town' and a Sub-County Town Centre for the purposes of retail provision. Regarding Moderate Sustainable Growth Towns, the CDP states that such towns should:

''[D]evelop in a self-sufficient manner and levels of growth should be balanced to ensure that any increase in population will be in tandem with employment opportunities, capacity in physical and social infrastructure and will not be based on long distance commuting. Economic development and service provision in these towns will be an important factor in determining the appropriateness of new housing. These towns need to provide a full range of services adequate to meet local needs, both within the town and in the surrounding rural catchment area, but not generate long distance travel patterns.'' (Pg. 46, Meath County Development Plan 2013-2019).

The majority of County Meath suffers from significant levels of outward commuting, however Dunshaughlin has shown a capacity to attract inward commuters also. This would suggest that there is additional capacity for the provision of further residential developments. Although the CDP argues for residential development and employment generation to occur in tandem, the reality is that often one must first occur before the other follows. The proposed development would provide accommodation to meet the growing demand in Dunshaughlin, increasing the critical mass that would, in turn, attract employers as well as building a case for the delivery of Phase 2 of the Dublin-Navan rail line.

In terms of zoning, the CDP differs from the Draft Development Plan discussed in the previous section. Firstly, the lands northwest of the Drumree Road roundabout are within the settlement boundary for the town and are zoned residential, highlighting a major difference with the DCDP which has de-zoned these strategically important lands. The lands southeast of the Drumree Road roundabout are also zoned residential and show another point of difference from the DCDP. The zoning objective for these lands designates them as part of the Phase II development process, to occur post 2019. Figure 6 shows the zoning objectives for Dunshaughlin.

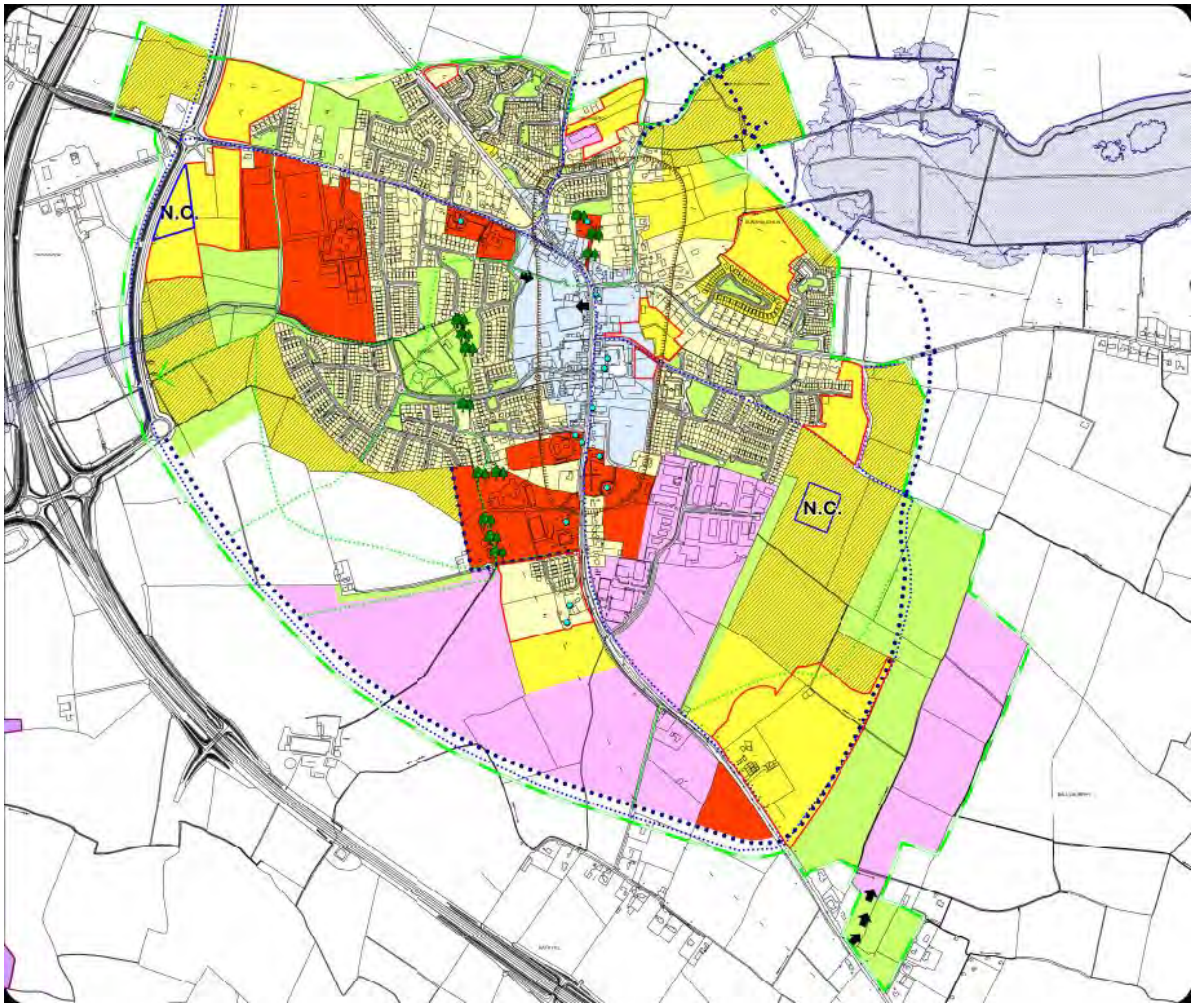

Figure 6. Dunshaughlin Land Use Zoning Objectives, Meath County Development Plan 2013-2019

3. Socio-economic Profile

This section provides a profile of the Dunshaughlin Urban Settlement Area, from a socio-economic perspective, drawing on the most recently available statistical information from the 2016 census, FAC projection modelling analysis and other sources. It includes:

- A summary of the socio-economic profile of Dunshaughlin Urban Settlement Area (unless stated otherwise) as informed by the 2016 census results with a particular focus on age, economic status, educational attainment, graduates, industry and workforce; and
- Analysis of a year-on-year projected population in Dunshaughlin Urban Settlement Area with a particular focus on the target years of 2026 and 2031 to align with the *'Transitional Regional and County Population Projections to 2031'* as set out in the *"Implementation Roadmap for the National Planning Framework"* (July, 2018), based on projections undertaken by FAC.

Possessing an understanding of the socioeconomic attributes of a study area offers insights into the area's housing requirements. In particular, population and housing are intrinsically linked, with a growing population usually resulting in an increased demand for housing. Similarly, the population composition, in terms of attributes such as age and categories of employment, will impact on the type of accommodation required, hence the need for a detailed socio-economic analysis.

3.1 Population and Age Profile

The Census of 2016 recorded Dunshaughlin as having a total population of 4,035 people, making it one of the largest settlements in County Meath, one which has seen its population increase dramatically in recent decades. Figure 7 is a population pyramid which illustrates the breakdown of Dunshaughlin's population based on predefined age ranges.

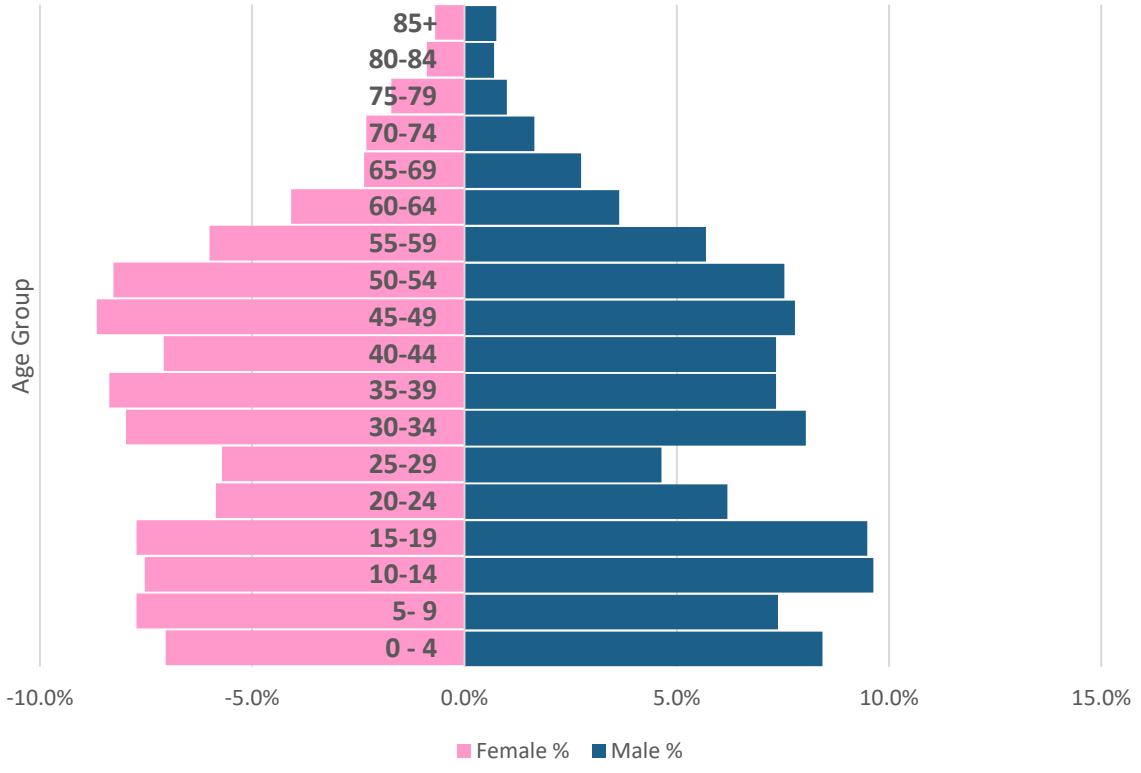

Figure 7. Dunshaughlin Population Pyramid, CSO

The largest cohort of the combined population are those aged 15 to 19. The largest cohort of males are those aged 10 to 14, whereas for females the largest cohort are those in the 45 to 49-year-old range. The average age of the entire population of Dunshaughlin is 33.6 years, which is younger than the average for Ireland (36.8 years).

Almost a quarter of the population (23.9%) is below the age of 15, with 68.7% of Dunshaughlin's population of working age (15 to 64) and approximately 7.4% over the age of 65. It is possible to determine the 'age dependency' of Dunshaughlin's population using these figures. Age dependency is a measure of the proportion of the population that lies outside of those deemed to be economically active, which is traditionally considered as those aged between 15 and 64. Dunshauglin has a dependent population ratio of 45.56 (dependent persons per 100 persons), which compares favourably to the State, which is 52.67. Table 3 below provides a comparison overview of both the youth dependency and old-age dependency in Dunshaughlin and the State.

Table 3. Age dependency

	Dunshaughlin	State
Youth Dependency (Under 15)	34.78	32.21
Old Age Dependency (Over 64)	10.77	20.45
Total Dependency (Combined)	45.56	52.67

Clearly then, Dunshaughlin has a young and growing population, one that has a higher proportion of persons of working age resident when compared to the State average. Such favourable demographics place Dunshaughlin in an enviable position but also requires the provision of suitable housing to meet the needs of current and future residents.

3.2 Education

Education attainment levels, or the highest level of education a person receives, can offer further insight into the composition of a local populaiton. Although higher education levels do not necessarily result in higher salaries, there is certainly a correlation between the two, with education often linked to improved employment opportunities. Therefore, if higher education attainment levels are identified, it is suggested that residents of this area are in positions where they can demand higher salaries and, therefore, seek out a greater range of housing options.

Figure 8 charts the levels of education attained by the population of Dunshaughlin, aged 15 or over, as recorded in the Census of 2016. The highest proportion are those who studied until 'upper secondary', which refers to the Leaving Certificate, and this category represents 21.4% of the total. A significant proportion of Dunshaughlin's adult population, approximately 34.3% of people, have attained a qualification that is at minimum a 'Level 7' on the National Framework of Qualifications (NFQ)[2]. A level 7 NFQ qualification refers to an Ordinary Degree in a third level institute. Furthermore, 10.7% of the population have achieved a Master's Degree or higher, which is Level 9 on the NFQ. These figures compare favourably to the State averages, where 28.5% of adults have attained a Level 7, while 10.1% have received a Master's degree or above.

[2] The National Framework of Qualifications (NFQ) is a system of ten levels used to describe the Irish qualifications system. The NFQ is based on standards of knowledge, skill and competence and incorporates awards made for all kinds of learning, wherever it is gained. More information available at: https://nfq.qqi.ie/

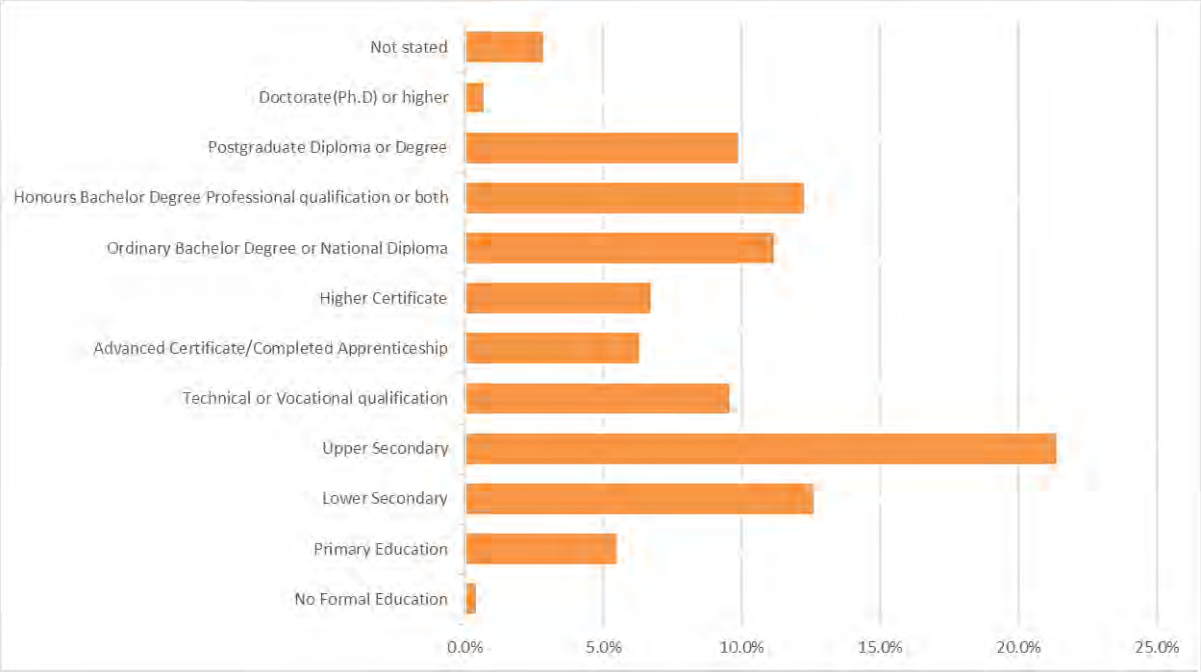

Figure 8. Education Attainment Levels, CSO

In addition to the levels of education it is worthwhile attempting to understand the type of studies undertake by those who received a degree-level education. The Census of 2016 records such information and provides the field of study for those over the age of 15. Figure 9 provides a visualisation of this information for Dunshaughlin, removing those who did not state (or had no) field of study and 'other subjects', where there was a minimal response rate. The largest cohort are those who studied subjects in the 'social sciences, business and law' fields, with 18.1% of the population. 'Engineering, manufacturing and construction' provides the second largest cohort, with 11.4%, while 'health and welfare' is the third largest (8.1%).

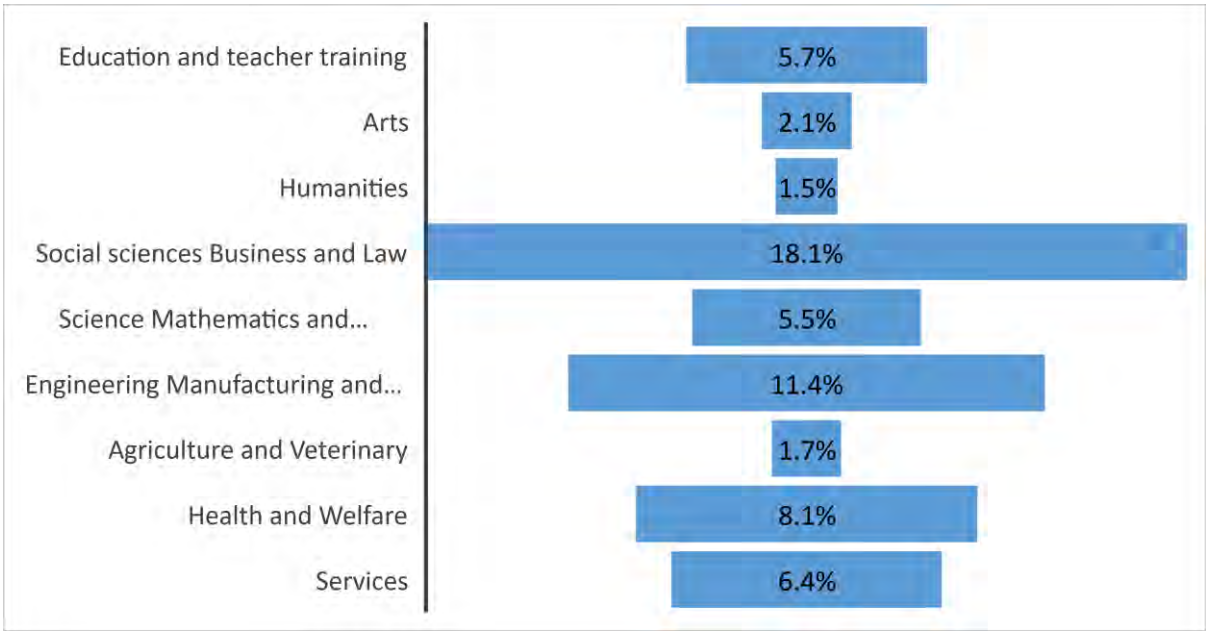

Figure 9. Fields of Study, CSO

3.3 Economy and Employment

Principal economic status is recorded in the Census and provides an overview of the composition of a workforce. While it does not provide data on unemployment that is as up-to-date as the Live Register, it still offers a useful snapshot in time for unemployment, as well as giving an indication of the proportion of students and retirees. The chart below (Fig. 10) showcases this information for Dunshaughlin, grouping some categories together for the purposes of this exercise. Almost 60% of the working age population are listed as at work, whereas only 5.8% are 'unemployed'. This figure for unemployed is lower than the State average which is 7.9%.

It is interesting to note the significant proportion of students that are found in Dunshaughlin, with 13.4% of respondents in this category. Students are generally those people who have just finished secondary school and are, therefore, quite a youthful cohort. Retaining this cohort, once their studies have been completed, could be essential for the local economy and important if Dunshaughlin is to continue to grow and remain as young, vibrant location. It is important, therefore, that new housing stock which meets the demand of the younger population is developed, allowing younger people from the locality to remain there. This housing stock should be varied and appropriate for young professionals and young families.

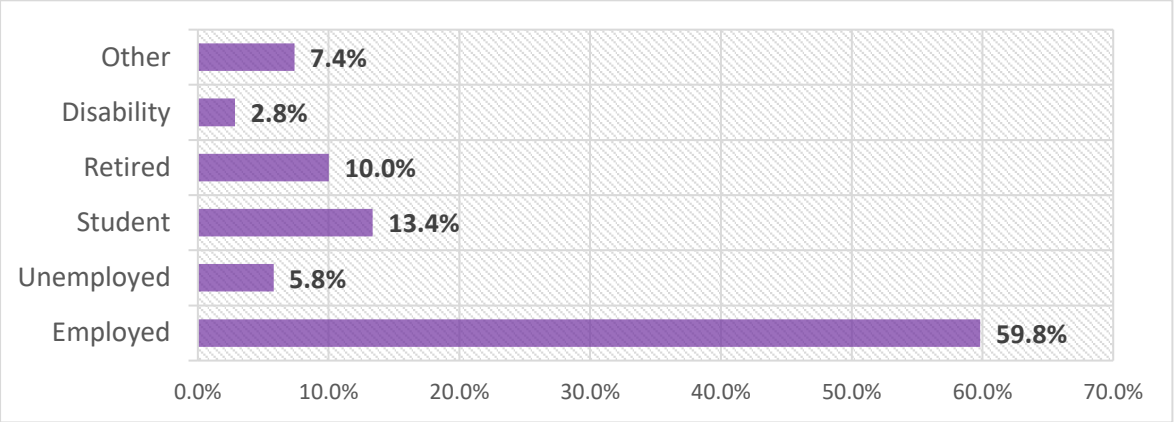

Figure 10. Principal economic status, CSO

Socio-economic groups are used to classify populations and brings together persons with similar social and economic statuses on the basis of the level of skill or educational attainment required. The groupings are not ranked in order to infer importance, they simply provide a means of classifying similar cohorts. Although it is impossible to discern earning capacity for particular socio-economic groupings, assumptions can be made. For example, it would be assumed that persons in the 'employers and managers' or 'higher professional' categories have, generally, a greater earning capacity that those in the 'semi-skilled' or 'unskilled' categories. Table 4 offers a comparison of socio-economic groupings between Dunshaughlin, County Meath and the State.

Table 4. Socioeconomic groupings

Socio-Economic Groups	Dunshaughlin	Meath	State
Employers and Managers	21.8%	18.7%	15.5%
Higher Professionals	7.5%	6.2%	7.1%
Lower Professionals	15.8%	11.1%	11.7%
Non-manual	21.3%	18.3%	18.0%
Manual Skilled	8.7%	10.9%	9.3%
Semi-skilled	6.7%	8.5%	8.6%
Unskilled	2.0%	3.4%	3.6%

Own Account Workers	4.9%	6.2%	5.2%
Agricultural Workers (incl. Farmers)	1.3%	5.0%	5.4%

Table 4 offers an indication of the skills and positions that the population of Dunshaughlin possess. It clearly shows that, when compared to both the County and State levels, Dunshaughlin's population is predominantly composed of those who would be employed in more technical, less manual roles and, potentially, have a greater earning capacity.

In order to further explore this inference, it is important to establish the occupation types of the workforce in Dunshaughlin. Figure 11 charts the occupation types identified in Dunshaughlin and by far the largest cohort are those who work in 'professional occupations', with 20.6% of the overall total. 'Associate professional and technical occupations' comprises the second largest cohort on 13.6%, again further emphasising the skilled and educated nature of Dunshaughlin's residents.

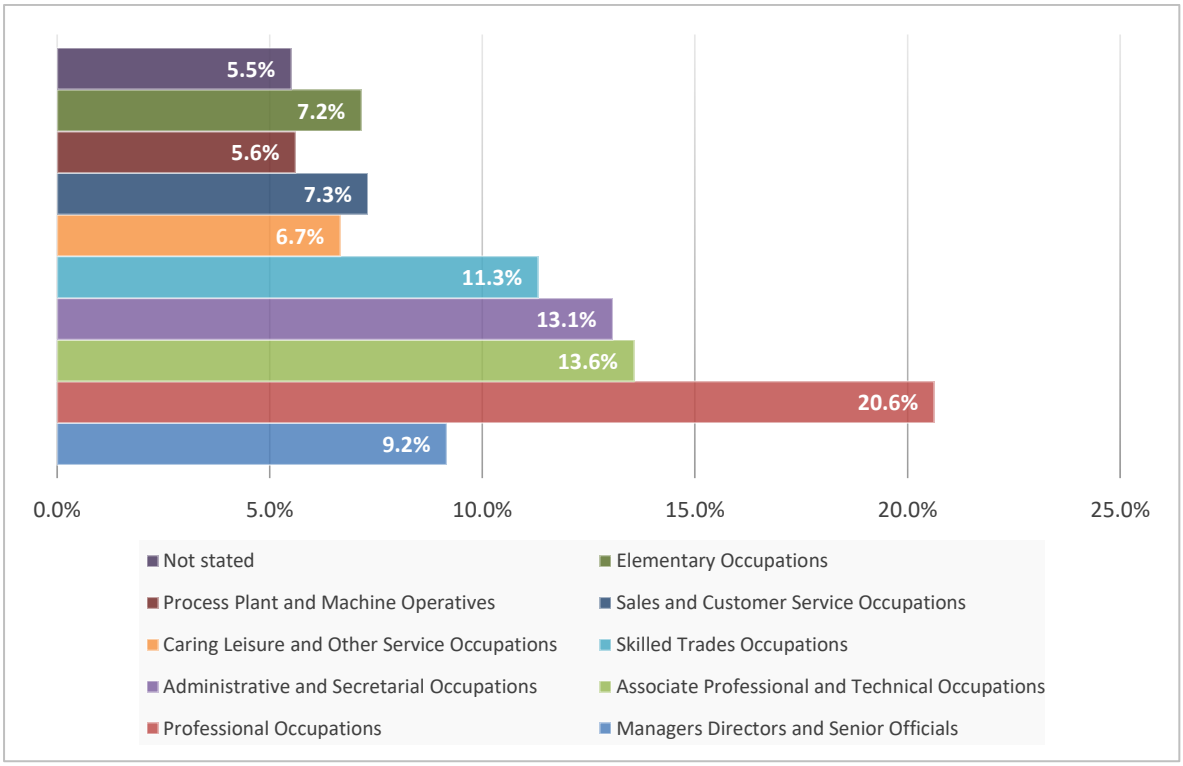

Figure 11. Socio-economic status, CSO

Finally, it is worth noting the industry types within which residents of Dunshaughlin are employed. The Census also records this information and groups respondents into broad industry types. In Dunshaughlin the largest industry of employment recorded for residents is 'commerce and trade' which represents almost 27% of the working population (26.9%). Professional services are the second largest industry of employment, with 'transport and communications' the third largest of those stated (12%). Once again, these figures would indicate a higher skilled, higher educated, and potentially higher earning workforce in Dunshaughlin. Clearly, Dunshaughlin is an attractive location for professional to reside and if this is to continue to be the case further residential development is required to satisfy the needs of this professional cohort.

3.4 Commuting and Travel Patterns

The CSO's Place of Work, School or College - Census of Anonymised Records (POWSCAR) data enables users to establish travel patterns and understand where people travel to and from for college, school

or work. This information is extremely useful in that it allows an analysis of commuting to be performed. The publicly available POWSCAR data combines school-goers, students and workers, which means it is not possible to determine the specific reasons for a trip. Nonetheless, it offers insights into the origins and destinations of commuting.

Figure 12 is a map that showcases the electoral divisions (EDs) to which residents of Dunshaughlin travel to for college, school or work. As indicated, locations as far as Cavan and Laois act as destinations for travellers. Unsurprisingly, the Dunshaughlin ED has the highest number of commuters, with surrounding EDs, particularly those to the east (Ratoath and Dunboyne) also destinations for high numbers. Several EDs within Dublin also prove popular, as would be expected for a town that is in such proximity to the capital.

Approximately 20% of all outward commuters from Dunshaughlin travel to the Dublin City County Council administrative area, which makes it the County with by far the largest number of outward commuters from Dunshaughlin (aside from County Meath). The three other Dublin local authorities also record high numbers of commuters from Dunshaughlin.

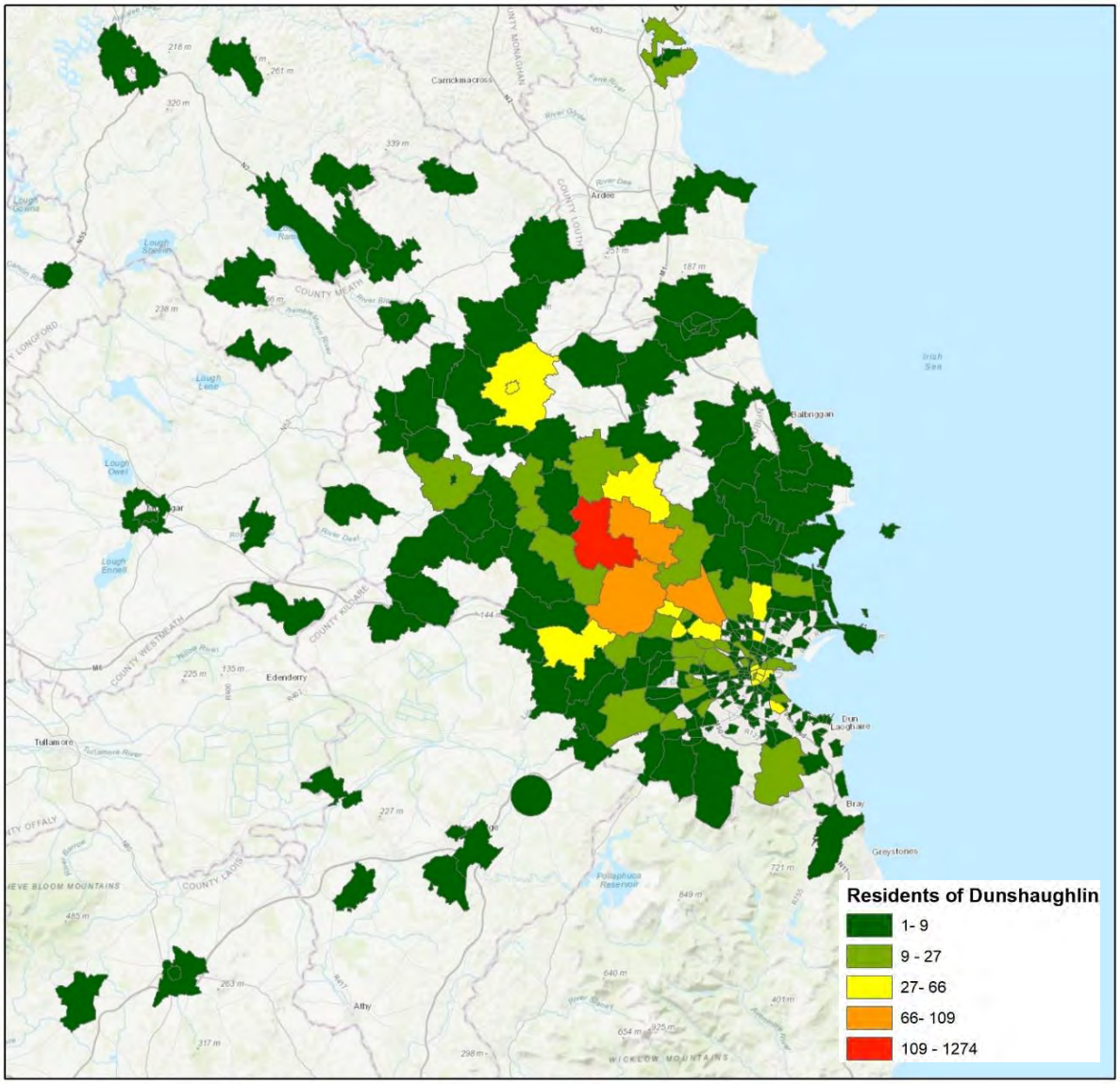

Figure 12. Outward commuting by ED, CSO POWSCAR

The next image (Fig. 13) shows the reverse trend. Inward commuters, those people that travel into Dunshaughlin for college, school or work. In this map a more condensed dispersal of commuters is established, with a gradual decline in the total number of commuters occurring the further from Dunshaughlin you go, unlike the outward commuting patterns which were more sporadic.

In this instance, there are far fewer Dublin EDs returning results, instead the Navan ED and Ratoath ED prove to be the most popular origins for people travelling to Dunshaughlin. Each of the EDs that are immediately adjacent to the Dunshaughlin ED record higher numbers of people commuting into Dunshaughlin, which would indicate the importance of the town as a key settlement in this particular corner of Meath.

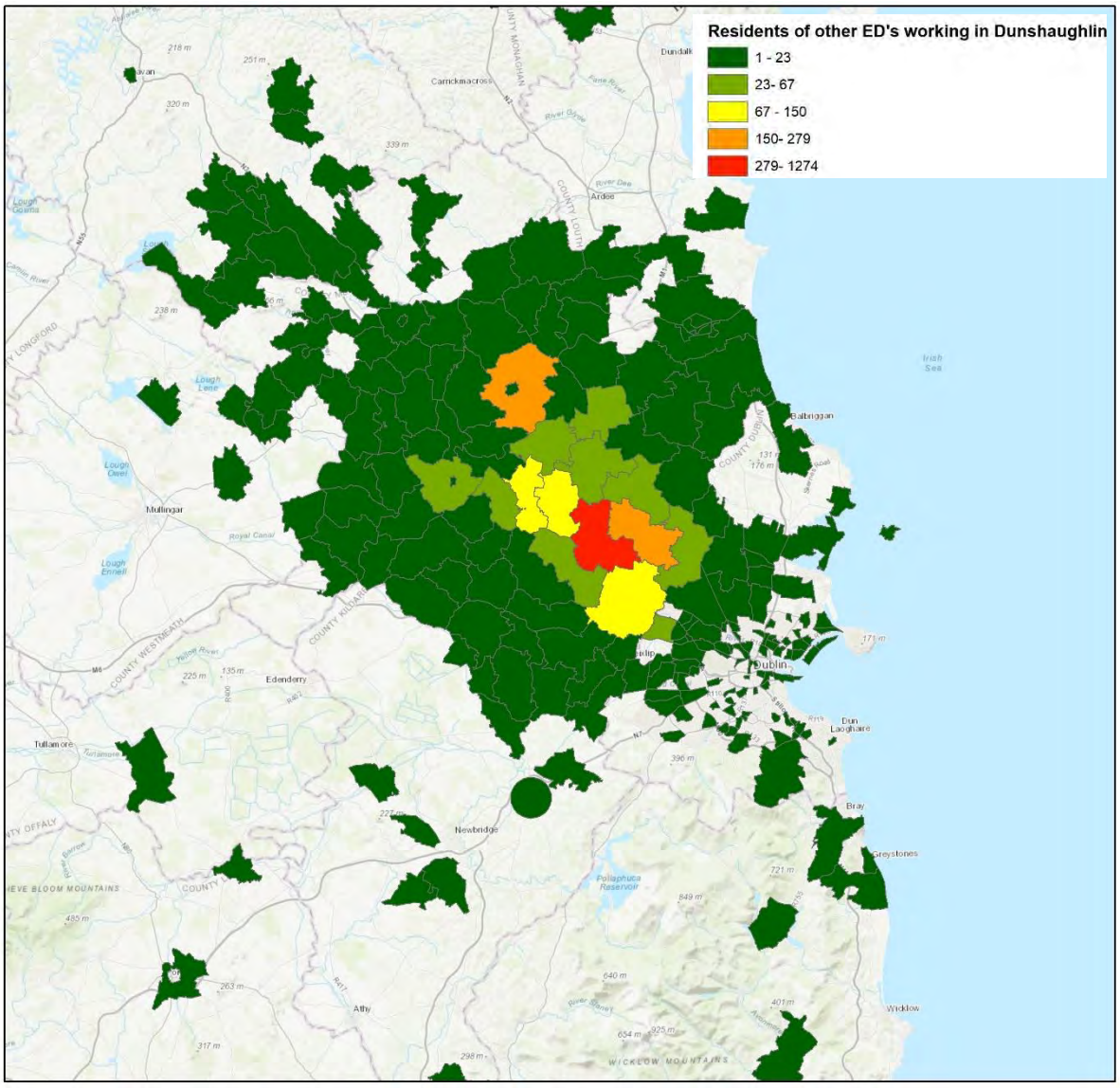

Figure 13. Inward commuting by ED, CSO POWSCAR

While there are a significant number of people who leave Dunshaughlin for work (2,358 based on the POWSCAR data), equally there is a substantial number that travel into the ED, with statistics suggesting a total of 1,809 persons. Such numbers could suggest there is potential demand for housing within the existing workforce catchment for the area. A significant proportion of inward commuters reside in County Dublin, indicating a potential target market for new residential development.

3.5 Future Population and Labour Force Projections

In order to assess the future needs for the settlement area, a population projection has been undertaken by FAC. This projection is done year-on-year with two primary focus years of 2026 and 2031, assessing age profile and labour force to achieve a comprehensive overview of the future employment demand in the settlement area. This review can be used to inform the need for additional homes and workspace for the growing population.

A demographic cohort analysis of the study area was undertaken by FAC using the Cohort Component Mode (CCM) methodology. CCM is a best in-class method for population projection world-wide and is the basis of the CSO projections. It considers population growth according to age specific levels, changes in fertility, mortality and migration over time. Utilising this method, the population of the study area has been projected forward to the focus years of 2026 and 2031.

Figure 14 charts the projected population change from the recorded census year of 2016 to 2031. As the chart indicates, there are steady increases in the population year on year. In 2026 it is projected that there will be an additional 723 people, which is a 17.9% increase on the 2016 figures. By 2031, the projected population for Dunshaughlin is 5,160, which is a 27.9% increase on the numbers recorded in 2016.

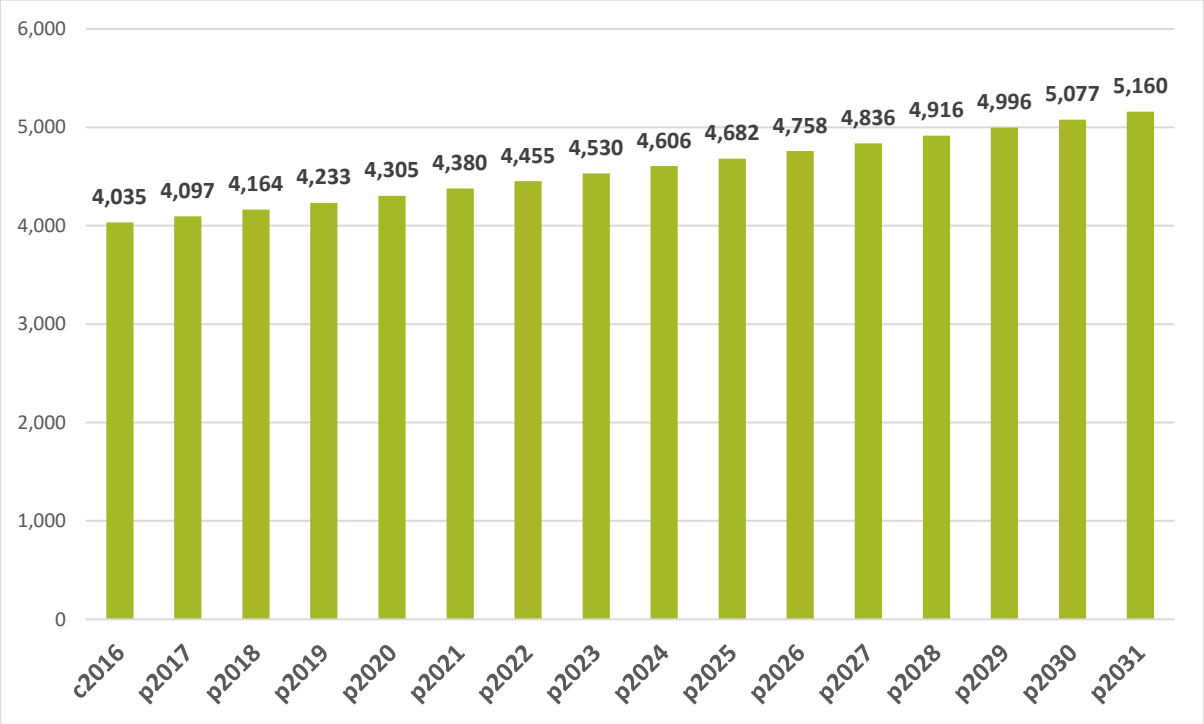

Figure 14. Projected population change

It is also useful to understand the composition of the projected populations, in terms of age ranges. FAC's CCM methodology allows for future projections to be made for individual years of age and with this it is then possible to group age ranges into similar categories. Figure 15 charts population changes for the years 2021, 2026 and 2031, with four age-range categories. Those aged 14 or under are one grouping, with those aged 65 and over a second grouping. For the purposes of this exercise, the group traditionally considered the ''working population'', which are those aged 15 to 64, have been split into two categories (15 to 44 and 45 to 64).

What is immediately obvious is that Dunshaughlin's youth population (under 15) is the only cohort that reduces in numbers. Each of the remaining three categories show increases, with the 65+ category representing the most substantial increase, rising from 299 persons in 2016 to 765 in 2031, a 60.9% increase. Perhaps the most interesting growth is found in the 15 to 44 age grouping, where there was an increase of over 20% to 2,181 persons. This cohort is, arguably, the most relevant to this study as it is usually the younger working population, which broadly corresponds to this 15 to 44 cohort, that is the most active in the housing market. If Dunshaughlin experiences such a growth in this age cohort it must have suitable housing supply to cater for this future demand. 'Suitable' housing for such a cohort would consist of mixed unit sizes, but particularly larger households that can cater for young, growing families.

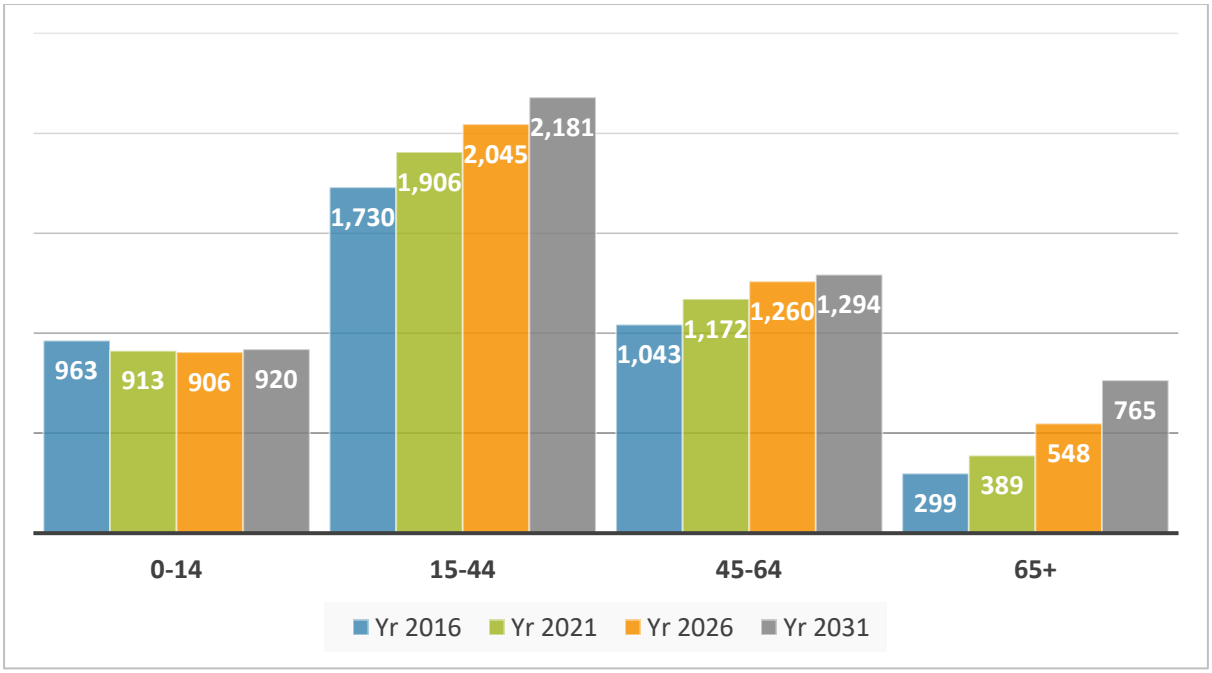

Figure 15. Projected population change by age cohort

The projected populations discussed above utilise one particular scenario developed by FAC, which are based on recent population growth trends. However, with alternative scenarios it is possible that growth could be significantly higher in Dunshaughlin, compared to these relatively modest growth figures projected. Population projections, by their nature, are inherently contingent on other factors and therefore open to debate.

In order to highlight the varied nature of projections Table 5 below provides the projected populations for County Meath and Dunshaughlin for the years 2022 and 2026, as identified in the current CDP, Draft CDP and FAC's own population model. It should be noted the current CDP does not possess projections for 2026 or at the level of Dunshaughlin, similarly, the Draft CDP does not indicate projected figures for the year 2022.

Table 5. Population projections comparison

	Dunshaughlin 2022	County 2022	Dunshaughlin 2026	County 2026
CDP 2013-2019	-	210,260	-	-
Draft CDP	-	-	6,235	227,500
FAC	4,455	212,567	4,758	225,220

The population projections made for the County in the current iteration of the CDP (2013-2019) are 2,307 persons lower than FAC's projections for the year 2022. Whereas the projections made for the County in the Draft CDP for the year 2026 are 2,280 higher than FAC's modelled scenario. In terms of Dunshaughlin, FAC's projections to 2026 are 1,477 lower than the Draft CDP's figures.

This disparity can be partly explained by the manner in which scenarios are developed. The FAC model can be considered a 'non-intervention' scenario, where recent trends in population change are projected forward. The Draft CDP, on the other hand, utilises an interventionist approach where policy measures (such as targeting of particular areas for growth) influence the projected figures.

The differences between projections, as seen in these three examples, highlight the complex nature of such models. However, while the FAC projections broadly align with the Draft CDP, at the level of Dunshaughlin they are perhaps slightly conservative considering the expected levels of growth that Dunshaughlin could experience. In this respect, it could be deemed appropriate to view the Draft CDP population projections as the more likely, particularly if various infrastructure developments, such as the Dublin to Navan rail line, are delivered and Dublin's economic growth continues.

3.6 Analysis of the Socio-economic Profile

Dunshaughlin has a younger, more highly educated and greater skilled population when compared to both the County and State averages. It acts as a sub-regional hub for economic activity in County Meath, seeing a higher proportion of inward commuters, in comparison to many other parts of the County. Furthermore, the population of Dunshaughlin is projected to increase each year to 2031, with the economically important age cohort of 15 to 44 year olds growing significantly over that same period.

Analysis of the socio-economic profile for Dunshaughlin, including the population projections made by FAC and in the Draft CDP, would suggest there is an imperative for the delivery of new, varied housing stock to meet the future demands of Dunshaughlin's population. With a large existing cohort of young, highly educated professional workers that is set to increase further, there will be a greater demand for premium residential properties of mixed unit sizes. Catering for this 'middle class' will ensure that Dunshaughlin can retain this particularly vital demographic, which will have further benefits for the town and environs.

4. Development Pipeline

An exercise to determine the planning application activity in the Dunshaughlin area was undertaken for the purposes of this report. It sought to locate planning applications that are of a scale which could influence the direction and composition of future developments or proposals. Applications for smaller residential developments with unit numbers below ten were excluded due to their limited nature. Only larger proposed residential developments are included. Similarly, commercial development applications are included, but only those of a certain scale. Figure 16 below provides a record of the locations of these applications.

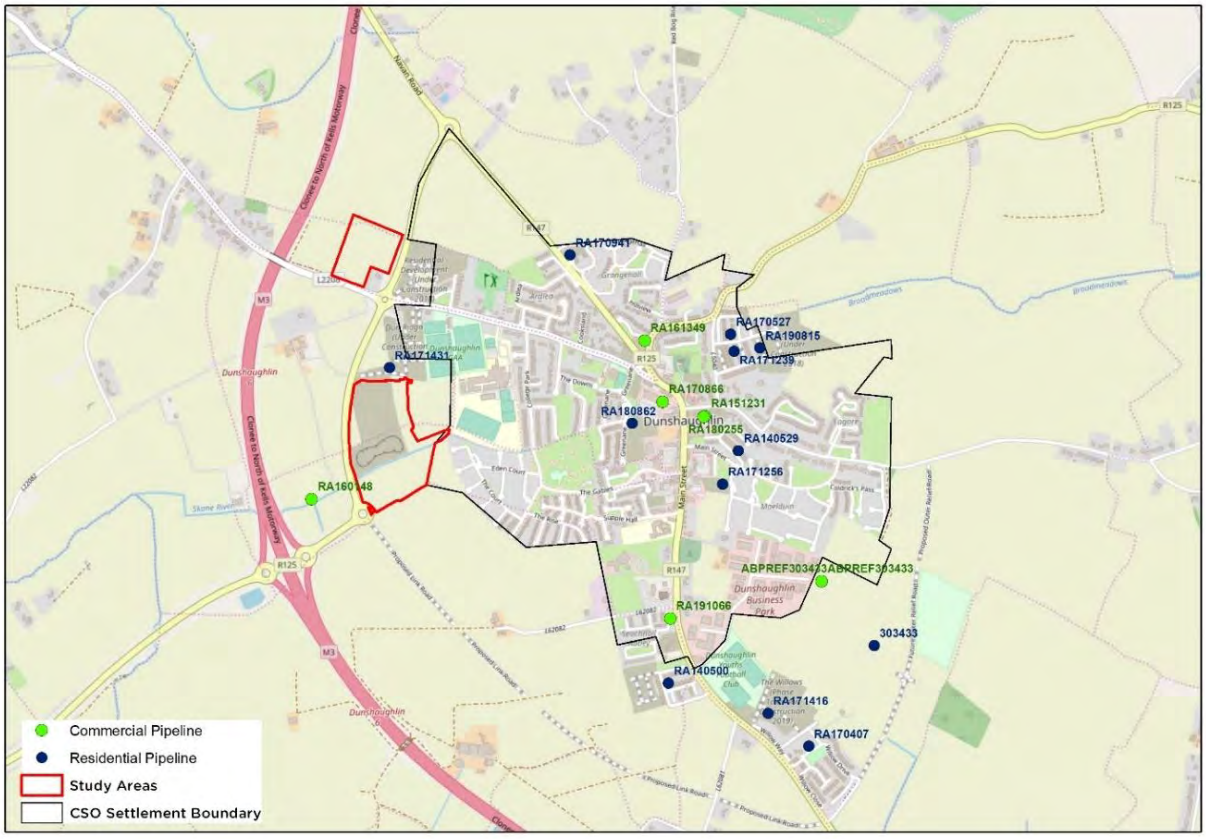

Figure 16. Pipeline residential and commercial developments

In total, there are twelve permitted planning applications for residential developments, including Castlethorn's Dún Rioga development which has recently been constructed and, therefore, will be excluded from the analysis. Two of the twelve applications relate to the same development, with one seeking an extension of permission, leaving ten separate developments to be considered. Across these ten permitted applications there are a total of 1,401 units proposed and of this total 305 units have been fully commenced, according to the planning application analysis. A table providing details on each of the residential planning applications identified is provided in the appendices to this report.

By far the largest application relates to the granted SHD by Rockture which, when completed, will see 913 residential units delivered on this site. It is worthwhile noting the comments made by the Planning Inspector from An Bord Pleanala who recommended permission be granted for this development. The Inspector concluded that:

''the proposed development would not seriously injure the residential or visual amenities of the area or of property in the vicinity, would be acceptable in terms of urban design, height and quantum of development and would be acceptable in terms of traffic and pedestrian safety and convenience. The

proposed development would, therefore, be in accordance with the proper planning and sustainable development of the area.''

It is important to reference the Draft County Development Plan in order to establish the quantum of residential units that could be delivered in Dunshaughlin. The Draft CDP provides Dunshaughlin with a household allocation for the 2020 to 2026 period of 1,003 units, of which it is stated that 600 are to be accounted for as part of the granted SHD application by Rockture. This leaves an allocation of 403 units for this period. The proposed Castlethorn development, which is the subject of this socioeconomic study, is seeking to construct 429 units. If permitted, the Castlethorn application would allow the household allocation to be met in advance of 2026 and do so in a single, coherent development, resulting in a more orderly and structured delivery of the household unit allocation.

Table 6. Draft County Development Plan Scenario

Draft CDP Allocation	SHD Units Attributed	Remaining Allocation
1,003 Units	600 Units	**403 Units**

A more forensic analysis of the Draft CDP figures and those obtained from the pipeline development study demonstrates that the effective capacity is, in fact, greater than the previous scenario indicates. The number of extant units not yet built is listed as 1,156 in the Draft CDP. Combining this figure with the allocation for the 2020-2026 period (1,003 units) results in a total of 2,159 units. This means that there are 2,159 units that have either already been permitted but not yet constructed or have been allocated for the time period. The pipeline development analysis performed for this study indicates a total of 1,401 units proposed as part of permitted applications. If this figure is deducted from the combined figure for extant and allocated units an effective capacity of 758 units is arrived at (2,159 – 1,401). In this regard, an argument could be made that an effective capacity of 758 units remains from the overall allocation for the 2020-2026 period. This remaining capacity would not include any extant, unbuilt developments, which also applies to the entire Rockture SHD located to the east of Dunshaughlin and referenced in the Draft CDP[3]. This would, therefore, leave sufficient scope for the permitting of the 429-unit Castlethorn development as, even after completion, an allocation of 329 units would remain.

Table 7. Pipeline Development Analysis Scenario

Extant Units (Draft CDP)	1,156 units
Allocated Units (Draft CDP)	1,003 units
Combined Total	**2,159 units**
[minus]	
FAC Pipeline Units	1,401 units
Remaining Allocation	**758 units**

Regardless of which of these two perspectives are taken, clearly there is capacity within the scope of the household allocations to accommodate the proposed Castlethorn development. In the first instance, the proposed development would result in the delivery of the household allocation when the permitted SHD is accounted for. In the second instance, where the pipeline figures determined by this study are subtracted from the combined Draft CDP figures, the proposed development would still allow for future residential developments within the overall scope.

[3] The entire Rockture SHD is accounted for within the combined unit total of 2,159. As detailed in the Draft CDP, 600 of the 913 SHD units *''have been included in the Household allocation''* which implies the remaining 313 units are categorised as 'extant units not yet built'.

5. Employment Potential

The ***Meath Economic Development Strategy 2014-2022*** identifies Dunshaughlin as an existing employment centre in the County, with the largest employment centre identified as Navan, accounting for almost one quarter of all jobs in Meath. The Meath County Development Plan 2013-2019 categorises Dunshaughlin as a *'District Employment Centre'* alongside Trim, Kilcock and Ratoath, requiring that these towns provide for the employment needs of their urban area as well as their rural hinterland. The economic strategy for Dunshaughlin, as described in the Plan, seeks to create conditions to attract employment and employers to the town. With the objective to:

"…avoid a scenario where population continues to grow but the commensurate level of employment is not generated. In so doing, the degree of commuting currently experienced in Dunshaughlin can be reversed, the town will be energized as employment is provided locally and more money is retained in the local economy because of expenditure on goods and services." (Source: Pg.654, Meath CDP 2013-2019).

As described in previous section, there is a significant level of outward commuting that occurs throughout Meath, including from Dunshaughlin. Outward commuting levels are high, but, Dunshaughlin also acts as a location that attracts a not insignificant number of inward commuters. However, as identified in Section 2 of this report, it is a long-term, overarching objective of all policies to reduce outward commuting from counties such as Meath, and develop more self-sustaining towns and settlements.

Dunshaughlin's proximity to Dublin has resulted in the heightened levels of outward commuting that occurs and this, as has already been outlined, is problematic for the long-term sustainability of the town. However, the proximity to Dublin can also be viewed as a major benefit for Dunshaughlin. Dublin is, and will continue to be, the State's primary economic driver. It is Ireland's largest city and is the location of choice for leading multi-nationals as well as a range of amenities and services that do not exist elsewhere in the State.

Furthermore, Ireland's largest international airport and primary seaport are both located in Dublin. For companies and for citizens, having easy access to such infrastructure and amenities would be viewed as extremely attractive. With house prices and land values significantly higher, and increasing, in Dublin when compared to the rest of the country, there is an inevitable search for better value locations that are still close enough to Dublin to allow access to the city's services.

Dunshaughlin has the potential to position itself as an extremely attractive location for both businesses and citizens to relocate, one that still offers easy accessibility to Dublin. Figure 17 offers a visual representation of a drive-time analysis performed as part of this study. It highlights the potential distances a person could travel by motor vehicle from Dunshaughlin in designated timeframes. Both Dublin and Navan are accessible within 20 minutes, while Dublin airport can be reached in under a half hour. Such proximity to key settlements and infrastructure offers companies or entrepreneurs an ideal location within which to establish 'second-site' offices or new facilities.

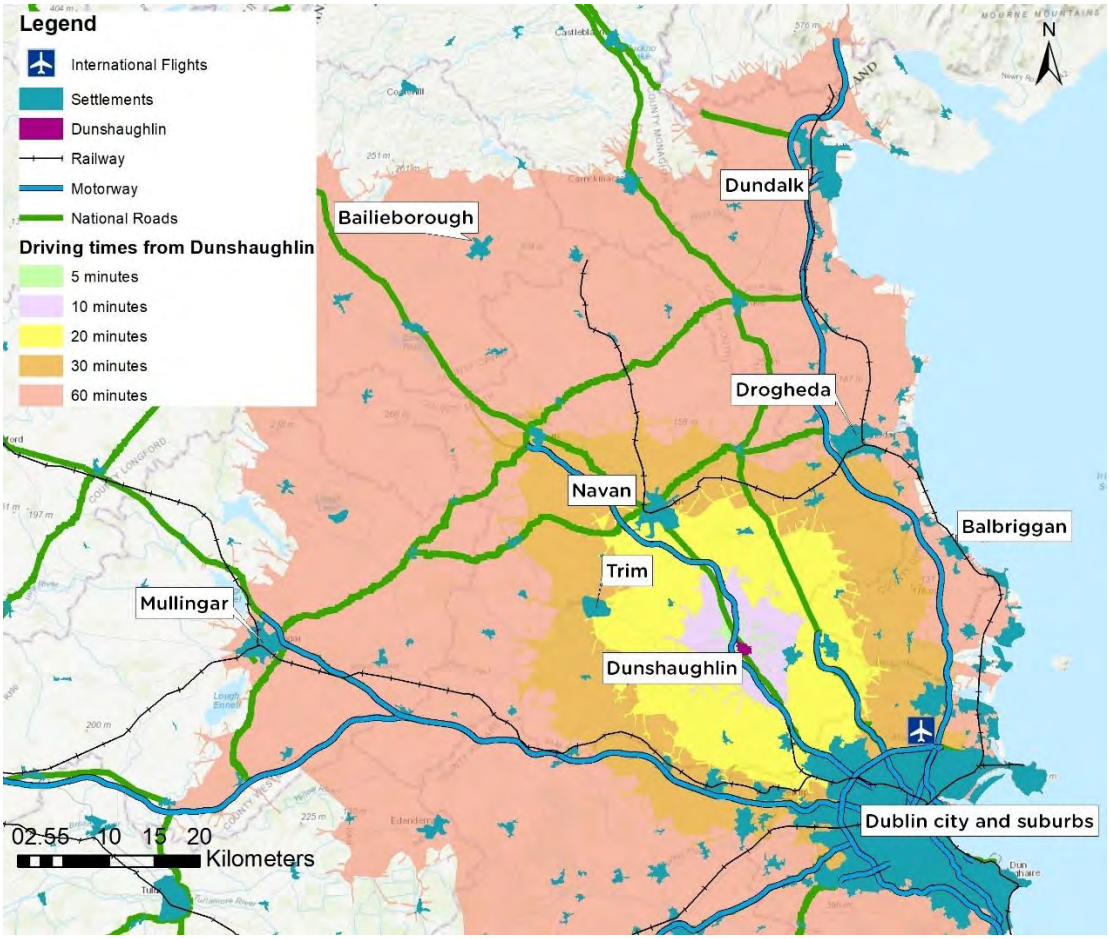

Figure 17. Drivetime analysis for Dunshaughlin

The proposed development is located on lands to the west of Dunshaughlin, with direct access to the M3 motorway. The southern boundary of the site is situated directly opposite lands zoned as 'E2 – General Enterprise and Employment' in the Draft County Development Plan 2020-2026. This zoning objective seek to *''provide for the creation of enterprise and facilitate opportunities for employment through industrial, manufacturing, distribution, warehousing and other general employment/enterprise uses in a good quality physical environment''*.

The proposed development would not only provide the necessary accommodation for a growing population, it would also provide housing directly adjacent to lands that are earmarked for enterprise and industry. In this respect, the proposed development would contribute towards the sustainable, long-term development of Dunshaughlin by providing housing that could support the employees of industries on these lands. By doing so, it would significantly reduce the proportion of outward commuting that occurs on a daily basis, offering employees homes that are within walking distance of their places of employment.

The strategic importance of Dunshaughlin and of the employment lands referenced is acknowledged in the Volume 2 of the Draft Development Plan:

''The location of Dunshaughlin on the national and regional road network provides excellent connections to Dublin and key regional towns which make the town an attractive location for potential employers. The Business Park in the southern part of the town is an important employment hub, with additional employment lands available to the south of the Dublin Road. These lands have the capacity to accommodate either locally based small-medium sized enterprises or a large stand-alone employment use.'' (Pg. 126, Vol. 2 Draft County Development Plan).

6. Conclusions

In conclusion, the socio-economic profile for Dunshaughlin, which also analysed aspects of the wider region, has indicated that Dunshaughlin will continue to experience growth levels that are above the national average. Dunshaughlin possesses a youthful and highly educated population who are predominantly employed in highly skilled, professional positions. The demographic characteristics of Dunshaughlin are abnormal in the context of the State averages and would suggest that Dunshaughlin is comprised of a significant number of young, middle-class residents. This would imply that further provision of new housing stock that caters to relatively affluent, young professionals and families would be appropriate.

Furthermore, the analysis on commuting indicates that although there is a significant proportion of outward commuting from Dunshaughlin, it is also a destination for a large number of inward commuters, including many from County Dublin. It is argued that there is the potential for even greater economic development in Dunshaughlin, building upon an already strong base, which would attract more people to the area and retain many of those leaving each day for work. There is also the added potential of enticing those commuters from Dublin with the promise of more affordable housing in the attractive surrounds of Dunshaughlin.

However, in order to enable enterprises to grow there first must be sufficient provision of residential property, and the Castlethorn development would meet these needs. Additionally, the southern boundary of the proposed development lies alongside a large tract of land zoned for enterprise development. Therefore, the proposed development would allow for residents to live alongside places of potential employment, adhering to the principles of sustainable communities and reducing outward commuting.

Finally, the pipeline housing analysis has highlighted the number of extant permissions that exist in Dunshaughlin. It is the opinion of this report that the total number of units that comprise the combined permissions, if built out, would still not meet the future needs of Dunshaughlin's growing population. The proposed development would help meet the demands of a growing population and constitute compact development that occurs within the existing built footprint of the settlement.

Appendix

Application Reference	Address	Grant Date	Expiry Date	Units	Notes
RA180862	Greenane Road, Dunshaughlin, Co. Meath	01/05/2019	01/05/2024	20	Granted – Full (not commenced)
RA170527	East of St. Seachnaill's Road and South East of Junction with Ratoath Road (R125), Dunshaughlin, Co Meath	11/10/2017	10/10/2022	32	Granted - Full (not commenced)
RA140529	Dunshaughlin, Co. Meath	08/03/2015	08/03/2020	25	Commenced
RA170407	The Willows, Dublin Road, Dunshaughlin, Co. Meath	15/09/2017	14/09/2022	92	Fully Commenced
RA170941	Grange Hall , Dunshaughlin , Co. Meath	03/10/2017	03/10/2022	10	Extended duration DA120414 Commenced
RA140500	Johnstown and Rath Hill Townlands, Dunshaughlin, Co. Meath	08/04/2015	07/04/2020	93	Fully Commenced
RA171239	East Of St. Seachnails Road & South East Of Junction with Ratoath Road(R125), Dunshaughlin , Co. Meath	09/04/2018	09/04/2023	96	Fully Commenced
RA171256	Maelduin to the rear of Main Street, Dunshaughlin, Co. Meath	10/07/2018	10/07/2023	24	Fully Commenced
RA171416	The Willows, Dublin Road, Dunshaughlin, Co. Meath	21/08/2018	20/08/2023	96	Granted – Full (not commenced)
303433	Lands to the north of the R147 / Dublin Road, Dunshaughlin , Co. Meath	23/04/2019	22/04/2024	913	Commenced
Total:					1,401 units of which 305 have been fully commenced.