



## Louth Retail Strategy

### Appendices March 2009

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**APPENDIX A**

**ADDITIONAL RETAIL AND PLANNING POLICY CONTEXT**

## **A. ADDITIONAL RETAIL AND PLANNING POLICY CONTEXT**

### **A.1 Introduction**

This Appendix provides an overview of additional relevant planning policies in the following hierarchical order:

- i. Regional;
- ii. County; and
- iii. Local

### **A.2 Additional Regional Planning Context**

#### **A.2.1 Retail Planning Strategy for the Greater Dublin Area 2001**

The *Retail Planning Strategy for the Greater Dublin Area 2001* (Retail Planning Strategy for the GDA) was published in 2001 with a review process commencing in the summer of 2007. Due to the fact that the Southern Environs of Drogheda are situated in the Greater Dublin Area and that interview surveys were conducted in Drogheda as part of the Retail Planning Strategy for the GDA, 'given its importance to northern parts of the GDA' (Section 2.11) and more specifically, 'because of its influence on shopping patterns amongst Meath residents in particular' (Section 2.15), it is included as part of this Report.

The Retail Planning Strategy for the GDA notes that the influence of Drogheda on the shopping patterns of Meath residents is unlikely to diminish in the foreseeable future. Section 5.101 of the Strategy states that: '*Current expenditure patterns indicate that Meath is a net importer of convenience expenditure but a significant exporter of comparison expenditure*'. The Strategy notes that much of the 42 per cent expenditure outflow goes to Dublin City Centre, Fingal and to Drogheda.

The Retail Planning Strategy for the Greater Dublin Area is currently under Review.

#### **A.2.2 Regional Planning Guidelines for the Greater Dublin Area, 2004**

The *Regional Planning Guidelines for the Greater Dublin Area 2004-2016* was prepared by the Dublin Regional Authority and the Mid-East Regional Authority in conjunction with the Dublin City, Fingal, Dun Laoghaire-Rathdown, South Dublin, Kildare, Meath and Wicklow Local Authorities. It is included as part of this Report due to the fact that Drogheda which lies in the Border Region is functionally significant for the GDA as well as the Dublin Belfast Corridor. The Regional Planning Guidelines for the GDA advocates the establishment of inter regional committees '*to ensure that data on major urban centres which have an influence on planning and transport in the GDA, such as Drogheda, is taken into account when monitoring requirements in the GDA*' (Recommendation 8.3).

### **A.3 Additional County Planning Context**

#### **A.3.1 Meath County Retail Strategy 2003**

The 'Meath County Retail Strategy' (Meath Retail Strategy) was adopted by Meath County Council on 3<sup>rd</sup> October 2003. It is relevant in the context of this policy review due to the fact that the Southern Environs of Drogheda are located in County Meath. The baseline information for the Strategy is derived from the 'Greater Dublin Area Retail Strategy 2001' (GDA Retail Strategy) and revised as appropriate by more up to date relevant information. Drogheda Environs is designated as a 'Level 3 Sub County Town Centre' alongside Kilcock Environs in the Strategy.

In terms of strategic policies relevant to Drogheda Environs contained within the Strategy, **Policy RS4** states that *'it is the policy of the Council to work with Louth and Kildare County Councils and Drogheda and Kilcock Town Councils to ensure that the retail needs of the populations in the expanding environs of Drogheda and Kilcock that are located in County Meath are met in a way that is sufficient, equitable and sustainable'*. In this context, the Strategy recognises the importance of ensuring that policies and proposals relating to the environs of Drogheda that are within Meath are compatible with those of Louth County Council, particularly in view of the fact 'significant' population increase is forecast for the area. The Strategy stresses the importance of meeting the convenience and other basic service needs of the emerging community of the Southern Environs of Drogheda locally. It is also noted that the Strategy states that *'where the retail needs and potential of either Drogheda or Kilcock cannot be met within town centre or edge of centre locations then, consistent with the RPG, the environs should be looked at to assist in meeting these needs'* (p. 84).

#### **A.3.1 Meath County Development Plan 2007 – 2013**

The *Meath County Development Plan 2007 – 2013* (Meath County Plan) sets out the overall planning framework for County Meath for the period up to 2013. The County Plan identifies the rapid population growth which has occurred in the Environs of Drogheda and identifies Drogheda Environs as a 'Large Growth Town' in the Hinterland Area. This designation is also applied to Navan. The County Plan specifically notes that *'it is the policy of this Council to primarily facilitate accommodation of regional residential growth in the three designated centres of Navan, Drogheda and Dunboyne/Clonee/Pace Rail Corridor'* (p.42). The County Plan further provides that *'All Large Growth Towns and Moderate Growth Towns will in so far as practical be self sufficient incorporating employment activities, sufficient retail services and social and community facilities'* (p.55).

The County Plan sets out that a Local Area Plan should be prepared for the Drogheda Environs. The County Plan restates the County Retail Hierarchy finding that Drogheda Environs is a Level 3 Sub County Town Centre for which the applicable level of floorspace provision is *'predominantly additional convenience but not excluding comparison'* (p.100).

#### **A.4 Additional Local Planning Context**

The Local Area Plan level is the most local level in the retail policy hierarchy. The Local Area Plans which have an influence on the Retail Strategy are:

- i. Dundalk South West Local Area Plan 2006;
- ii. Local Area Plan for the North Drogheda Environs 2004;
- iii. North Drogheda Environs Master Plan 2006: Variation to the North Drogheda Environs Local Area Plan 2004 (Variation No. 1); and
- iv. Drogheda Docklands Area Plan 2007.

##### **A.4.1 Dundalk South West Local Area Plan, 2006**

The *Dundalk South West Local Area Plan* (DSWLAP) was adopted by Louth County Council and Dundalk Town Council in June 2006. Covering parts of the District Electoral Divisions of Dundalk Urban, Castletown and Haggardstown, the plan area lies to the southwest of the existing built-up area of Dundalk. The DSWLAP sets out a broad guiding framework for the future built development of the area. Comprising an area of 600 hectares, the DSWLAP envisages that the full development of the Plan could provide an estimated population of 20,000 persons. The DSWLAP divides the plan area into a series of five geographical sectors, of which, three are envisaged to provide Civic and Commercial Centres, namely Mounthamilton, Priorland and Fairhill.

With specific reference to the three Civic and Commercial Centres and the designated Crumlin Local Centre, the Plan notes that the Maunthamilton, Priorland and Fairhill Civic and Commercial Centres can be anchored by a convenience store not exceeding 1,600 square metres gross floorspace in size. Other uses listed as being permissible at each of the three centres includes a convenience or comparison unit not exceeding 250 square metres gross floorspace in size. The Crumlin Local Centre is also noted as having capacity for up to 250 square metres gross convenience floorspace.

##### **A.4.2 North Drogheda Environs Local Area Plan July 2004**

The *North Drogheda Environs Local Area Plan* (North Drogheda Environs LAP) was prepared in the context of the *Louth County Development Plan 2003 – 2009* and was adopted by Louth County Council in July 2004. The stated purpose of the Plan is '*to facilitate and promote the development of the area with ensuring that such development is carried out in a manner that is sustainable and consistent with the orderly expansion of the town of Drogheda*' (p. 6). The Plan applies to an area of 254 hectares located approximately 2 km north of Drogheda Town Centre.

In terms of retail and commercial development, the North Drogheda Environs LAP provides for three neighbourhood centres which adjoin primary school sites (one in each neighbourhood). This is intended to facilitate joint journeys to shops and schools and meet the needs of the local community.

In addition to the three neighbourhood shopping centres, “provision is made for a retail park with a maximum floor area of 15,000 square metres to meet the need for retail warehousing in the environs area and the wider Drogheda area” (p. 38). In terms of uses that will be permitted in the retail park, the Plan specifies that:

*“Only uses appropriate to retail parks will be permitted such as bulky goods, sports equipment and DIY stores. Up to a maximum of 10% of each unit area may be utilised for small scale higher value goods associated with the primary permitted use. Sub division of units into stores less than 7,000 square metres or in excess of 6,000 square metres gross (including any ancillary garden centre) will not be permitted. In addition, food retailing will not be permitted within this zone” (p. 38 of NDELAP).*

#### **A.4.3 North Drogheda Environs Master Plan 2006: Variation to the North Drogheda Environs Local Area Plan 2004 (Variation No. 1)**

The ‘North Drogheda Environs Master Plan 2006’ (Master Plan) was adopted by Louth County Council in 2006 and is a variation to the North Drogheda Environs LAP. While the North Drogheda Environs LAP requires the preparation of a master plan for each of the three residential neighbourhoods identified in the plan, Louth County Council have prepared this single Master Plan dealing with each of the three neighbourhoods in order to ensure integration between neighbourhoods and facilitate adherence to legislative and regulatory requirements.

In terms of quantum and type of retail and non-retail floorspace, the Master Plan requires that ‘Civic and Commercial Centre One’ and ‘Civic and Commercial Centre Two’ will comprise the following gross areas: 1,000 – 1,600 sq m (target) of anchor supermarket; 900 sq m (target) of convenience retail; 600 sq m (target) of comparison retail (each unit not to exceed 150 sq m); 3,000 sq m (minimum) of service employment; 500 sq m (target) of café and pub; 700 sq m (minimum) of community and civic, and; 1,400 sq m (minimum) of education (p. 43 and p. 45). It also required that ‘Civic and Commercial Centre Three’ will contain the following gross areas: 1,175 sq m (841 sq m net) of anchor supermarket; 1,472 sq m of comparison retail; 1,607 sq m of service employment; 910 sq m of pub and café; 215 sq m of community and civic, and; 1,400 sq m of education (p. 47).

#### **A.4.4 Drogheda Docklands Area Plan 2007**

The *Drogheda Docklands Area Plan 2007* (DAP) focuses on the Inner Quays area of Drogheda and was adopted as a Variation to the *Drogheda Borough Council Development Plan 2005 – 2011* on 26<sup>th</sup> February 2007. The aims of the DAP are to: “Identify the main issues affecting the Docklands Area; Outline the constraints and opportunities for regeneration; Present a new vision for the area; Detail a robust Framework for achieving the vision; Provide a basis for consensus among the main actors in the planning and development of the area, and; Form the basis of future planning policy and guidance” (Section 1.1).

In terms of existing land uses the DAP notes that the new Scotch Hall development has ‘brought larger town centre uses to the area, setting up a

*new retail anchor on the south side of the river' and that 'it will impact significantly on the existing pattern of uses and activities of the town' (Section 2.3.2). The DAP indicates that small and medium sized retail units will be required at the ground floor level and on the main frontages. The Plan notes that 'the number and frequency of retail and service units should be maximised to reflect a fine grain of development at ground floor level' and that 'suitable uses would include local convenience, small specialist retail, restaurants and cafés, and office support services such as reprographics and supplies'(Section3.3.3).*

## **A.5 Conclusion**

The additional Regional and National Policy Guidance highlighted in this Appendix illustrates the influence of Drogheda on the northern elements of the Greater Dublin Area. In particular, it highlights the challenges in providing an adequate level of retail provision necessary to meet the requirements of its expanding southern environs located in County Meath. As highlighted in Section 2 of this Report this has, to an extent, been addressed through the adoption of Planning Strategy for the Greater Drogheda Area in early 2007. On a more localised level the adoption of a series of Local Area Plans in both Dundalk and Drogheda provide the framework for the future development of new residential communities. However, all local plans reflect that the respective town centres of Dundalk and Drogheda must be regarded as the primary location for retail provision in their wider hinterlands.



**APPENDIX B**

**SUB COUNTY POPULATION PROJECTION METHODOLOGY**

## **B. DETAILED POPULATION PROJECTION METHODOLOGY**

### **B.1 Data Sources**

Since the preparation of the 2002 Study a number of important strategic planning documents and new data have been published which provide the foundations and inputs to the derivation of the updated Study's population projections. Each of these has been examined in the preparation of the Report and population projections constructed. The projections are based on the following range of published data and analysis:

- Central Statistics Office (CSO) final results of the 2002 and 2006 Census;
- CSO Regional Population Projections, 2005;
- CSO Population and Migration Estimates, 2006;
- Review of National Population Projections and Regional Population Targets 2006 – 2020 published by the Department of the Environment, Heritage and Local Government (DoEHLG), 2007;
- National Spatial Strategy (NSS), 2002;
- Regional Planning Guidelines for the Border Region (RPGBR), 2004;
- Population data contained in the Louth County Development Plan (County Plan), 2003 – 2009;
- Population projections in the Dundalk and Environs Development Plan (Dundalk Plan), 2003 – 2008;
- Demographic information contained in the Drogheda and Environs Development Plan (Drogheda Plan), 2005 – 2011;
- Planning Strategy for the Greater Drogheda Area, 2007 and
- Ardee Local Area Plan (Ardee Plan), 2003 – 2009.

### **B.2 Methodology**

To take further account of the potential differing levels of population growth in the future we construct **low** and **high** population growth scenarios. These scenarios are projected for the current year (2007), 2011, the end of the next CDP period (2015) and the end of the NSS/RPGBR period (2020). Our approach employs both targeted accelerated growth and zonal population methodologies to take account of the projections set out in the documents outlined above. Due regard is further given to plans at a national level which may effect population trends in the future such as the plans for public sector decentralisation announced in 2004.

The data set out in Section 4 of this Report highlights the varying levels of population expansion witnessed in County Louth. To take full account of this our methodology divides County Louth into five distinct zones. These are Greater Dundalk, Greater Drogheda, Ardee Urban, Louth North and Louth

South areas. Such an approach allows us to target specific sub areas for accelerated growth following the guidance provided in the NSS and RPGBR.

The 2002 Strategy adopted population forecasts not only for County Louth, but also for a 20 minute extended catchment in both the Republic and Northern Ireland. As set out in Section 3 of the Report, our methodology utilises both shopper and household shopper information to provide a more realistic and concise databank of baseline information with regard to estimating the potential for additional retail floorspace in the County. Our overall Study Area therefore comprises the entirety of County Louth and the St. Mary's ED located in County Meath.

### **B.3 Greater Dundalk Area**

The NSS and the BRPG designate Dundalk as a 'Gateway' along with Sligo and Letterkenny in the Border Region. The BRPG sets out a specific population projection of 60,000 for Dundalk in 2020. The Dundalk Plan considers a wider definition of Dundalk and Environs which includes the Dundalk Urban Area and the entire ED's of Ballymacscanlan, Castletown, Haggardstown and Dundalk Rural (Greater Dundalk Area). The Dundalk Plan estimated a 2006 population in this area of 43,208. However, data from the 2006 Census indicates a population of 39,048 in this area.

To achieve the 60,000 level of population for the Greater Dundalk Area as set out in RPGBR will require an annual growth rate of approximately 3.2% in the period 2006 – 2020. This represents a substantial increase on the annual level of growth which took place in the period 1996 – 2006. The **high scenario** envisages Dundalk fully developing into its role as a primary urban centre in the Border Region and key Gateway on the developing M1/A1 transport corridor. Dundalk's relative distance from Dublin and improving infrastructural links with the surrounding centres of Newry, Carrickmacross and Castleblaney will enable Dundalk to anchor growth in this area of the Border Region and provide a significant level of indigenously driven expansion. The **low scenario** assumes that the Greater Dundalk Area will continue to grow in the long term, albeit not at the level anticipated in the RPGBR having regard to the guidance provided that specific population targets may be achieved over a longer timeframe than 2020. Overall, these scenarios envisage the Greater Dundalk Area experiencing a future level of demographic expansion as befitting its role as Regional Gateway.

### **B.4 Greater Drogheda Area in County Louth**

Drogheda is designated as a 'Primary Development Centre' in the NSS and RPGBR with an approximate population target range of 50,000 – 60,000 in the period to 2020 and beyond. It is recognised as a key development node along the M1/A1 transport corridor. The Planning Strategy for the Greater Drogheda Area notes the variations with regard to population projections for Drogheda within published planning policy and specifically acknowledges that although located in the Border Region, Drogheda is increasingly influenced by the Dublin Metropolitan Area due to its relative proximity and good infrastructural links. For the purposes of this report we designate the Greater Drogheda Area in County Louth as comprising Drogheda Borough and the entirety of the St. Peter's ED located in County Louth (this includes the area covered by the North Drogheda Environs LAP and Masterplan).

Data from the 2006 Census indicates a population of 32,995 in this area. This equates to an average annual growth rate of approximately 2.3% in the period since 1996. The **low and high scenarios** project a population in the range of 42,000 – 53,000 for this area in 2020 having regard to the towns continuing attraction as a residential location, strong links with the wider Dublin Region and designation in the NSS/RPGBR. These levels of projected expansion are in line with the forecasts contained in the Drogheda Plan and the Planning Strategy for the Greater Drogheda Area having regard to the slightly differing areas under consideration. Drogheda's hinterland (including environs) located in County Meath are considered separately below.

## **B.5 Ardee**

The Ardee Plan sets out a specific projection of 5,000 by 2009 having regard to recent residential developments and the availability of suitably zoned lands. The **low scenario** anticipates a slight moderation in this growth with the population rising to close to 7,500 by 2020. The **high scenario** assumes Ardee will continue to increase its attraction as a residential location with longer term growth underpinned by the construction of the Ardee Bypass. This scenario, therefore, projects sustained growth in the town's population rising to 8,414 by 2020.

## **B.6 Remainder of County Louth**

The remainder of County Louth is predominantly rural in nature and comprises a series of small towns and villages including Carlingford, Dunleer and Collon. Notwithstanding the traditional rural fabric of these areas, a high level of growth has been witnessed in the period since 1996. This is primarily driven by overspill from the main centres of Dundalk, Drogheda and Ardee, returning emigrants seeking to live in their native area and the increasing attraction of smaller urban settlements as residential locations underpinned by quality of life issues.

### **B.6.1 Remainder of North Louth**

Dundalk and Drogheda provide counterbalancing pivots for growth with the latter influenced greatly by the expanding Dublin conurbation. Growth in the remainder of the North Louth area in the period since 1996 lagged that experienced at County and State levels over the same period. The **low scenario** estimates that growth will moderate slightly in the period to 2020 as development pressures become more acute in smaller villages and the open countryside. The **high scenario** envisages a general continuation of the trends evident in the 1996 – 2006 period as the area experiences a continuing ripple expansionary effect in light of the continuing development of the Greater Dundalk Area.

### **B.6.2 Remainder of South Louth**

Growth in the remainder of the South Louth area is primarily attributable to overspill from Drogheda as demographic expansion filters northwards underpinned by the expansion of employment opportunities both in

Drogheda and the wider Dublin conurbation. Overall, the **low scenario** projects a moderation of growth in the period to 2020 with the **high scenario** envisaging a broad continuation of the levels of growth witnessed in the 1996 – 2006 period.

### **B.7 Greater Drogheda Area in County Meath**

An element of the Greater Drogheda Area is located in County Meath including emerging suburbs such as Colpe Cross and Bryanstown. For the purposes of this report we project the population forward for entirety of the St. Mary's ED. The population of this ED has risen from 3,529 in 1996 to over 9,000 in 2006, a rise of 156.3%. As noted, in the 2002 – 2006 period the CSO recognised this ED has one of the top 10 fastest growing areas in the State. Therefore, having regard to the specific projections set out in the Planning Strategy for the Greater Drogheda Area and our slightly differing definition of the Greater Drogheda Area we assume that growth in this area will continue to outpace County, Regional and State averages in the period to 2020, albeit at a significantly lower pace than that experienced in the decade to 2006. This is consistent with the overall demographic vision contained in the Planning Strategy for the Greater Drogheda Area. The **low and high scenarios** therefore project the population of this area rising to 15,500 by 2020.

### **B.8 Comparison of Population Projections**

Table B.1 sets out our detailed population projections for both our high and low scenarios for the period up to 2020.

**Table B.1  
Population Projections**

<b>Sub County Area</b>	<b>Av Rate (%)</b>	<b>2006</b>	<b>2007</b>	<b>2011</b>	<b>2015</b>	<b>2020</b>
<b>Low Scenario:</b>						
Greater Dundalk Area <sup>1</sup>	1.3	38,776	39,346	41,489	43,517	46,191
Greater Drogheda Area <sup>2</sup>	1.7	32,995	33,563	35,932	38,469	41,893
Ardee <sup>3</sup>	4.0	4,301	4,473	5,233	6,122	7,448
North Louth Remainder	1.0	18,389	18,573	19,327	20,112	21,138
South Louth Remainder	1.4	16,806	17,041	18,016	19,046	20,417
<b>Total County Louth</b>	<b>1.5</b>	<b>111,267</b>	<b>112,996</b>	<b>119,997</b>	<b>127,266</b>	<b>137,087</b>
Greater Drogheda Area in County Meath <sup>4</sup>	3.9	9,044	9,399	10,961	12,784	15,500
<b>Total Study Area</b>	<b>1.7</b>	<b>120,311</b>	<b>122,395</b>	<b>130,958</b>	<b>140,050</b>	<b>152,587</b>
<b>High Scenario:</b>						
Greater Dundalk Area <sup>1</sup>	3.2	38,776	39,978	45,311	51,355	60,000
Greater Drogheda Area <sup>2</sup>	3.4	32,995	34,130	39,074	44,735	53,000
Ardee <sup>3</sup>	4.9	4,301	4,512	5,466	6,621	8,414
North Louth Remainder	1.8	18,389	18,720	20,105	21,592	23,606
South Louth Remainder	3.2	16,806	17,342	19,670	22,312	26,117
<b>Total County Louth</b>	<b>3.1</b>	<b>111,267</b>	<b>114,682</b>	<b>129,626</b>	<b>146,615</b>	<b>171,137</b>
Greater Drogheda Area in County Meath <sup>4</sup>	3.9	9,044	9,399	10,961	12,784	15,500
<b>Total Study Area</b>	<b>3.2</b>	<b>120,311</b>	<b>124,081</b>	<b>140,587</b>	<b>159,399</b>	<b>186,637</b>
<p>Note: <sup>1</sup> includes the Dundalk Urban Area and the entire ED's of Ballymacscanlan, Castletown, Haggardstown and Dundalk Rural  <sup>2</sup> defined as the Greater Drogheda Area in County Louth comprising Drogheda Borough Area and the entirety of St. Peter's ED  <sup>3</sup> defined as Ardee Urban ED  <sup>4</sup> defined as the entirety of the St.Mary's ED in County Meath</p>						

Source: Tom Phillips + Associates (2008)

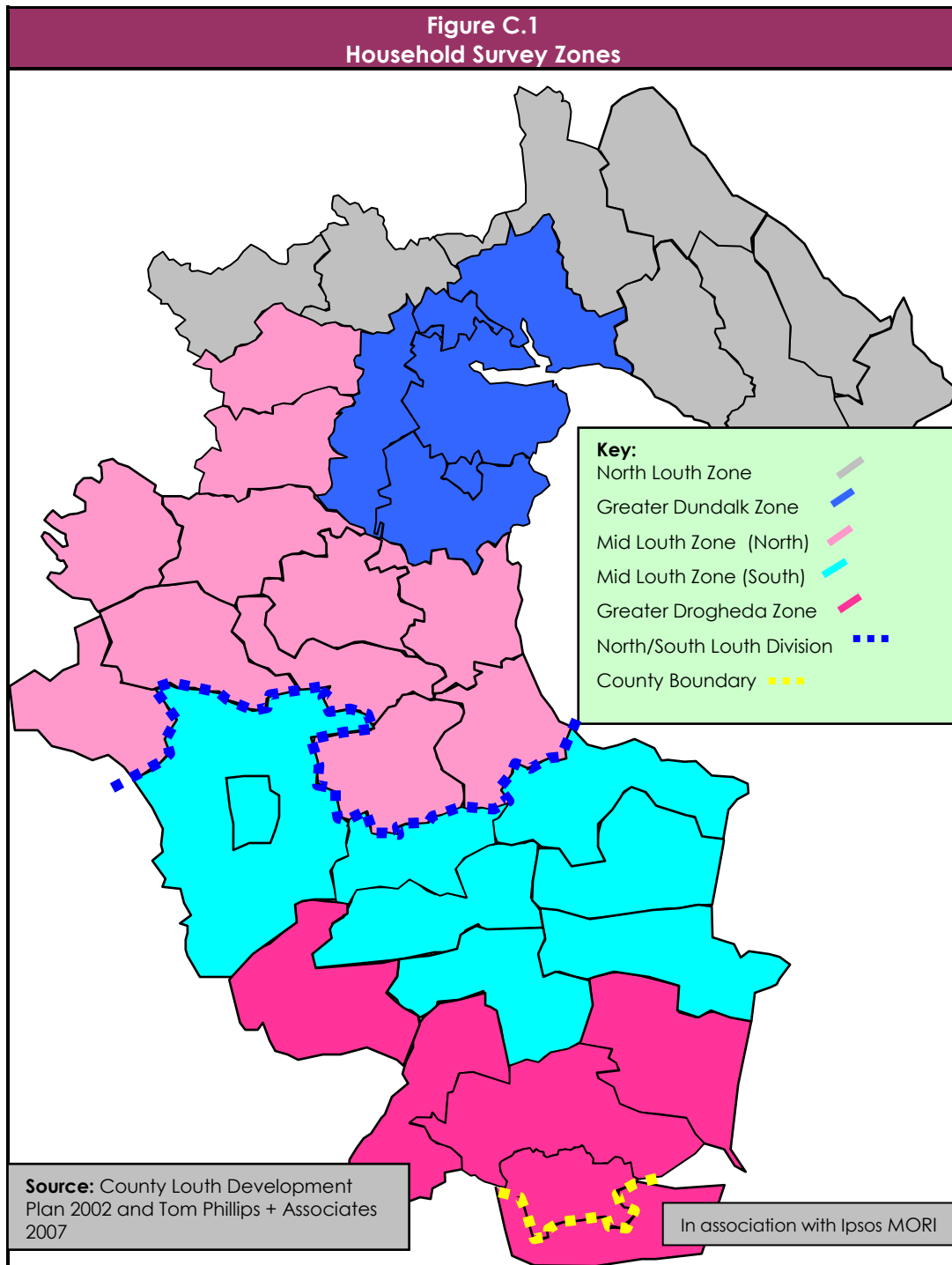
**APPENDIX C**

**ADDITIONAL HOUSEHOLD SURVEY INFORMATION**

## C. HOUSEHOLD SURVEY ADDITIONAL DATA

### C.1 Household Surveys - Methodology

The Study Area was divided into 5 no. survey zones to ensure a balanced distribution of survey respondents was obtained relative to existing population densities. This methodology permits a greater level of data to be obtained, particularly in relation to examining the relative attraction of Dundalk, Drogheda and Ardee as retailing centres. Figure C.1 sets out the distribution of Household Survey Zones across the Study Area.





## C.2 Origin of Respondents and Information Provided

Table C.1 sets out that the distribution of household surveys was undertaken relative to existing population densities. The data indicates that 58% of survey respondents were located in the Greater Dundalk and Drogheda zones. The remaining 42% of respondents were distributed equally across the remaining zones.

<b>Table C.1 Origin of Household Shopping Respondents</b>		
<b>Origin by Survey Zone</b>	<b>Respondents</b>	<b>Percentage (%)</b>
North Louth	50	14
Greater Dundalk	100	29
Mid Louth (North)	50	14
Mid Louth (South)	50	14
Greater Drogheda	100	29
<b>Total</b>	<b>350</b>	<b>100</b>

Source: Ipsos MORI Household Survey (2007)

The information provided relates to:

- i. Main Food Shopping;
- ii. Top Up Shopping;
- iii. Clothing and Footwear Shopping;
- iv. Bulky Goods Shopping;
- v. Expenditure Levels;
- vi. Frequency of Shopping Trip;
- vii. General Comments; and
- viii. Respondent Profile.

## C.3 Main Food Shopping

Table C.2 identifies that 88% of respondents undertook their main food shopping within the Study Area. Dundalk emerged as the most popular destination with 54% of respondents undertaking their main food shopping in this location. A further 28% of respondents carried out this type of shopping in Drogheda with 15% undertaking their main food shopping in Ardee. Outside of the Study Area, Newry is, by far, the most popular destination for main food shopping purposes. 10% of all survey respondents shop at this location for their primary convenience needs. Interestingly, nearly three quarters (73%) of the respondents who carry out their main food shopping in Newry do so at Sainsbury's – a store not yet located in the Republic of Ireland.

Within Dundalk, the Tesco located in the Dundalk Shopping Centre is the most popular store (13%) notwithstanding the arrival of newer format stores such as Dunnes Stores in the Marshes Shopping Centre (12%). In Drogheda Dunnes

Stores located in Scotch Hall has established itself as the most popular main food shopping location in Drogheda with 10% of all respondents visiting this location.

<b>Table C.2 Main Food Shopping Destinations</b>			
<b>Location</b>	<b>Store</b>	<b>Respondents</b>	<b>(%)</b>
Dundalk	Tesco, Dundalk SC	47	
	Dunnes Stores, Marshes SC	42	
	Dunnes Stores, Echo Road	40	
	Tesco, Long Walk	25	
	SuperQuinn, Carroll Village	22	
	Aldi, Dublin Road	10	
	Other	3	
	<b>Total</b>	<b>189</b>	<b>54</b>
Drogheda	Dunnes Stores, Scotch Hall	35	
	SuperValu, Stockwell Av	18	
	Tesco, West Street	14	
	Dunnes Stores, West Street	11	
	Aldi, Trinity Street	10	
	Lidl, Donore Road	5	
	Other	5	
	<b>Total</b>	<b>98</b>	<b>28</b>
Ardee	Supervalu, Market Street	12	
	Lidl, Dublin Road	1	
	Other	2	
	<b>Total</b>	<b>15</b>	<b>4</b>
Other Locations in Study Area	Various	8	2
<b>Total within Study Area</b>		<b>310</b>	<b>88</b>
Newry	Various	33	10
Carrickmacross	Various	5	1
Ashbourne	Various	2	1
<b>Total outside Study Area</b>		<b>39</b>	<b>12</b>

Source: Ipsos MORI Household Survey (2007)

It is also possible to examine the main food shopping locations of respondents by survey zone. This is illustrated in Table C.3 below. This permits the identification of the real level of attraction of centres outside of the Study Area by sub county area. The primary findings of this data are:

- Dundalk is the most popular destination for main food shopping in 4 out of the 5 survey zones considered;
- Newry is a particular attraction for main shopping purposes in the North Louth (32%) and Greater Dundalk (12%) zones;
- The attraction of Carrickmacross is limited to a small pocket in the north east of County Louth; and
- Ardee does not possess any significant attraction as a main food shopping location outside of its immediate hinterland.

<b>Table C.3 Main Food Shopping Destinations by Survey Zone</b>			
<b>Household Survey Zone</b>	<b>Destination</b>	<b>Respondents</b>	<b>% of Survey Zone</b>
North Louth	Dundalk	30	60
	Newry	16	32
	Other	4	8
	<b>Total</b>	<b>50</b>	<b>100</b>
Greater Dundalk	Dundalk	85	85
	Newry	12	12
	Other	3	3
	<b>Total</b>	<b>100</b>	<b>100</b>
Mid Louth (North)	Dundalk	39	78
	Carrickmacross	4	8
	Newry	2	4
	Other	5	10
	<b>Total</b>	<b>50</b>	<b>100</b>
Mid Louth (South)	Dundalk	31	62
	Ardee	10	20
	Drogheda	6	12
	Newry	2	4
	Other	1	2
	<b>Total</b>	<b>50</b>	<b>100</b>
Greater Drogheda	Drogheda	90	90
	Dundalk	4	4
	Ardee	2	2
	Ashbourne	2	2
	Other	2	2
	<b>Total</b>	<b>100</b>	<b>100</b>

Source: Ipsos MORI Household Survey (2007)

#### **C.4 Top Up Shopping**

The localised nature of top up shopping is reflected in the wide distribution of locations identified. Top up shopping is predominantly carried out close to where people live and/or work. Table C.4 indicates that 95% of respondents last top up shopping trips were carried at locations within the Study Area. The most popular top up shopping locations were Drogheda (25%), Dundalk (21%), Castlebellingham (7%) and Dromiskin (6%). Just 3% of all respondents carried out their top up shopping outside of the Study Area.

<b>Table C.4 Top Up Shopping Shopping Destinations</b>		
<b>Location</b>	<b>Respondents</b>	<b>Percentage (%)</b>
Drogheda	86	25
Dundalk	73	21
Castlebellingham	24	7
Dromiskin	22	6
Carlingford	17	5
Ardee	16	5
Dunleer	11	3
Blackrock	9	3
Louth Village	8	2
Omeath	7	2
Ravensdale	5	2
Other Locations in Study Area	53	15
<b>Total within Study Area</b>	<b>331</b>	<b>95</b>
Locations outside Study Area	12	3
<b>Total outside Study Area</b>	<b>12</b>	<b>3</b>
Other/Don't Know	7	2

Source: Ipsos MORI Household Survey (2007)

### **C.5 Clothing and Footwear Shopping**

On a zone by zone basis Table C.5 illustrates that Dundalk is the most prominent location in the North Louth, Greater Dundalk, Mid Louth (North) and Mid Louth (South) survey zones. This indicates that respondents are travelling to Dundalk from as far south as Dunleer and Clogherhead for their clothing and footwear purchases. The following key points are also highlighted:

- Newry is, again, an attractive location for clothing and footwear shopping purposes in the North Louth (26%) and Greater Dundalk (9%) zones;
- Dublin City Centre, and to a lesser extent Dublin Suburban Centres, have a limited attraction for clothing and footwear shopping across all survey zones;
- The attraction of Dublin City Centre and Suburban Centres is not more pronounced in the Greater Drogheda survey zone than in the other survey zones considered; and
- Ardee attracts respondents from its immediate hinterland only for clothing and footwear shopping purposes.

<b>Table C.5 Clothing and Footwear Shopping Destinations by Survey Zone</b>			
<b>Household Survey Zone</b>	<b>Destination</b>	<b>Respondents</b>	<b>% of Survey Zone</b>
North Louth	Dundalk	26	52
	Newry	13	26
	Dublin City Centre	6	12
	Other	5	10
	<b>Total</b>	<b>50</b>	<b>100</b>
Greater Dundalk	Dundalk	73	73
	Newry	9	9
	Dublin City Centre	5	5
	Dublin Suburban Centres	5	5
	Other	8	8
<b>Total</b>	<b>100</b>	<b>100</b>	
Mid Louth (North)	Dundalk	37	74
	Drogheda	4	8
	Newry	3	6
	Dublin City Centre	3	6
	Other	3	6
<b>Total</b>	<b>50</b>	<b>100</b>	
Mid Louth (South)	Dundalk	23	46
	Drogheda	13	26
	Ardee	5	10
	Dublin City Centre	4	8
	Other	5	10
<b>Total</b>	<b>50</b>	<b>100</b>	
Greater Drogheda	Drogheda	85	85
	Dundalk	5	5
	Dublin City Centre	2	2
	Dublin Suburban Centre	2	2
	Other	6	6
<b>Total</b>	<b>100</b>	<b>100</b>	

Source: Ipsos MORI Household Survey (2007)

## **C.6 Bulky Goods Shopping**

An analysis of bulky goods shopping destinations by survey zone indicates that Dundalk is the favoured location for bulky goods shopping for the majority of respondents from the North Louth (72%), Greater Dundalk (87%), Mid Louth – North (70%) and Mid Louth – South (60%) survey zones. The attraction of Drogheda for this type of shopping is limited to the southern elements of the Study Area, primarily the Greater Drogheda survey zone. The location of Drogheda in closer proximity to the Dublin Metropolitan Area has not resulted in a large outflow of respondents to locations in and around Dublin City and Suburbs for bulky goods shopping. The data indicates that just 6% of Greater Drogheda area respondents travelled to these locations for this type of shopping.

Table C.6 further highlights the attraction of Newry as a bulky goods shopping location, although this attraction is limited to the North Louth (18%) and Greater Dundalk (5%) survey zones.

<b>Table C.6 Bulky Goods Shopping Destinations by Survey Zone</b>			
<b>Household Survey Zone</b>	<b>Destination</b>	<b>Respondents</b>	<b>% of Survey Zone</b>
North Louth	Dundalk	36	72
	Newry	9	18
	Dublin City Centre	3	6
	Other	2	4
	<b>Total</b>	<b>50</b>	<b>100</b>
Greater Dundalk	Dundalk	87	87
	Newry	5	5
	Drogheda	2	2
	Other	6	6
	<b>Total</b>	<b>100</b>	<b>100</b>
Mid Louth (North)	Dundalk	35	70
	Drogheda	6	12
	Carrickmacross	2	4
	Other	7	14
	<b>Total</b>	<b>50</b>	<b>100</b>
Mid Louth (South)	Dundalk	30	60
	Drogheda	11	22
	Ardee	4	8
	Other	5	10
	<b>Total</b>	<b>50</b>	<b>100</b>
Greater Drogheda	Drogheda	81	81
	Dundalk	4	4
	Dublin City Centre	3	3
	Dublin Suburban Areas	3	3
	Others	9	9
	<b>Total</b>	<b>100</b>	<b>100</b>

Source: Ipsos MORI Household Survey (2007)

### **C.7 Expenditure Levels**

The household survey also contained a series of questions relating to the amount of money spent by respondents on their last main food, top up, clothing/footwear and bulky goods shopping trips. Table C.7 highlights that the highest proportion of respondents spent in the range €51 - €100 on main food shopping (34%), between €0 - €25 on top up shopping (81%), in the range €51 - €100 on clothing/footwear (33%) and over €751 on bulky goods (32%).

Table C.7 Expenditure Levels (%)				
Expenditure Levels	Main Food	Top Up	Clothing/ Footwear	Bulky
€0 - €25	3	81	4	2
€26 - €50	10	10	21	6
€51 - €100	34	3	33	9
€101 - €150	31	1	11	3
€151 - €200	16	1	13	10
€201 - €250	4	1	2	1
€251 - €300	1	-	5	7
€301 - €500	-	-	6	12
€501 - €750	-	-	1	6
Over €751	-	-	2	32
Don't Know	1	3	2	12
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	

Source: Ipsos MORI Household Survey (2007)

### C.8 Frequency of Shopping Trips

Table C.8 sets out the overall frequency of shopping trips for all respondents categorised by main food and top up shopping. The data indicates that over two thirds of all respondents, 68%, undertake their main food shopping once a week with a further 19% of respondents undertaking this type of shopping twice a week or more. However, 80% of respondents undertake their top up shopping twice a week or more illustrating that this type of shopping trip is more closely associated with smaller, more frequent trips.

Table C.8 Frequency of Shopping Trip (%)		
Frequency	Main Food	Top Up
Twice a Week or More	19	80
Once a Week	68	14
Once a Fortnight	10	2
Once a Month	2	1
Once Every Two Months	1	-
Never	-	3
<b>Total</b>	<b>100</b>	<b>100</b>

Source: Ipsos MORI Household Survey (2007)

### C.9 Market Share by Sub County Zone

Tables C.9 and C.10 highlight that the northern element of the Study Area retains 80% of convenience expenditure and 71% of comparison expenditure within its area. This indicates that although Newry remains a prime attraction for North County Louth residents, this attraction diminishes significantly south of Dundalk. Overall, Dundalk remains the key retail attraction in this element of the Study Area, particularly in the Mid County Louth area.

Table C9 Level of Expenditure– North Study Area <sup>1</sup>						
Location	Convenience (%)			Comparison (%)		
	Main	Top Up	Total	Clothing Footwear	Bulky	Total
<b>North Study Area</b>	<b>78</b>	<b>92</b>	<b>80</b>	<b>69</b>	<b>71</b>	<b>71</b>
<i>of which</i>						
Dundalk	78	49	73	68	71	71
Carlingford	-	14	2	1	-	-
Other	-	29	5	-	71	71
<b>Outside North Study Area</b>	<b>22</b>	<b>8</b>	<b>20</b>	<b>31</b>	<b>29</b>	<b>29</b>
<i>of which</i>						
Newry	16	1	14	8	11	11
Carrickmacros	2		2	1	1	1
Belfast	-	-	-	3	4	4
Dublin City	-	-	-	5	1	2
Drogheda	-	-	-	3	4	3
Other	4	7	4	11	7	7
<b>Note:</b> <sup>1</sup> Comprises North Louth, Greater Dundalk and Mid Louth (North) Zones as set out in Figure C. 1						

Source: Ipsos MORI Household Survey (2007)

Table C.10 highlights that the southern portion of the Study Area – including the centres of Drogheda and Ardee – retain 70% of total convenience expenditure and 65% of overall comparison expenditure. These relatively high levels of expenditure leakage are primarily attributable to the fact that Dundalk remains a very popular retail location for respondents in and around the Ardee area with Dundalk accounting for 80% of convenience leakage and 60% of overall comparison leakage. This indicates that the current retail catchment area of Dundalk extends south to Ardee.

It should be noted that although the southern element of the catchment area exhibits higher levels of expenditure leakages from its defined area, overall leakage outside of the Study Area is higher in the northern element of the Study Area due to the fact that the vast majority of the southern areas leakage stays within the Study Area (i.e Dundalk).



Table C10 Level of Expenditure– South Study Area <sup>1</sup>						
Location	Convenience (%)			Comparison (%)		
	Main	Top Up	Total	Clothing Footwear	Bulky	Total
<b>South Study Area</b>	<b>68</b>	<b>85</b>	<b>70</b>	<b>73</b>	<b>65</b>	<b>65</b>
<i>of which</i>						
Drogheda	59	49	58	67	63	63
Ardee	8	14	9	6	2	2
Other	-	22	3	-	-	-
<b>Outside South Study Area</b>	<b>32</b>	<b>15</b>	<b>30</b>	<b>27</b>	<b>35</b>	<b>35</b>
<i>of which</i>						
Newry	1	-	1	-	-	-
Carrickmacross	-	-	-	1	-	-
Dundalk	26	8	24	16	21	20
Dublin City	-	-	-	9	5	6
Dublin Suburbs	-	-	-	1	4	4
Ashbourne	2	-	1	-	-	-
Other	3	7	4	-	5	5
<b>Note:</b> <sup>1</sup> Comprises Greater Drogheda and Mid Louth (South) Zones as set out in Figure C. 1						

Source: Ipsos MORI Household Survey (2007)

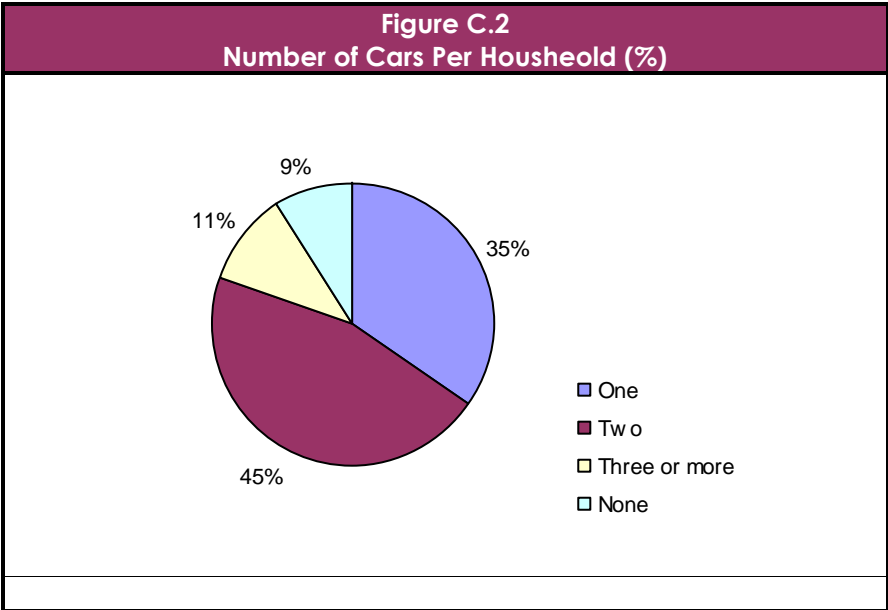
### C.10 General Comments

The following general comments were made by respondents:

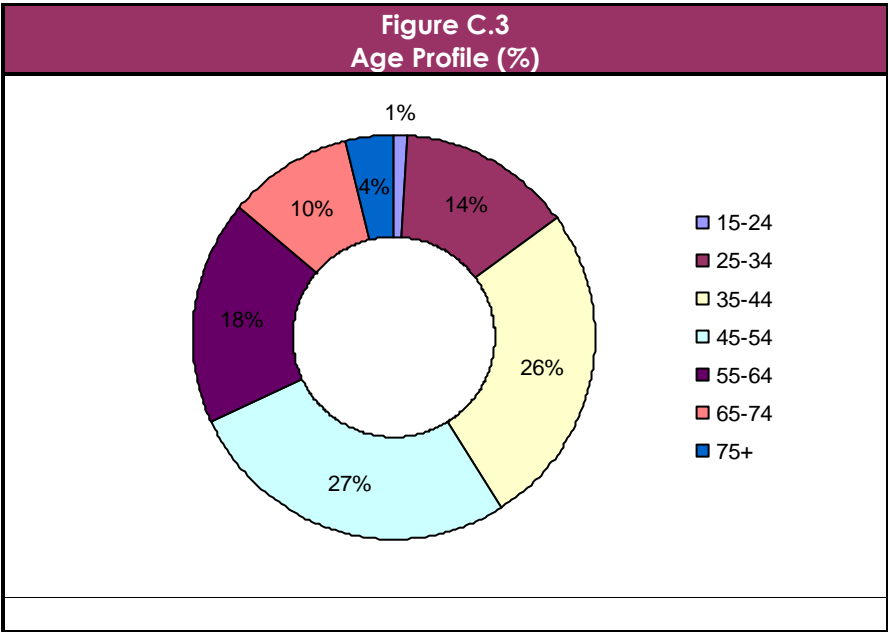
- Some 29% of respondents go out at least once a week in the evening to a restaurant or bar with a further 27% of respondents going out at least twice a month
- Dundalk was the most popular evening entertainment venue with 31% of respondent travelling to this location for a meal or drink. The other most popular destinations are Drogheda (21%), Carlingford (7%) and Dunleer (6%).

### C.11 Respondent Profile

Figures C.2 and C.3 present the key profile of the household survey respondents in terms of number of cars per household and age profile.



Source: Ipsos MORI Household Survey (2007)



Source: Ipsos MORI Household Survey (2007)

**APPENDIX D**

**ASSESSMENT OF COMPETING CENTRES**

## **D. ANALYSIS OF COMPETING CENTRES**

### **D.1 Introduction**

Section 6 and Appendix C identified a number of towns located in surrounding Counties which impact on shopping patterns within the County. It should be noted that the 2002 Study additionally identified Castleblayney and Navan as competing centres directly impacting upon retailing patterns in County Louth. However, the detailed results of our household and shopper surveys illustrates that in 2007 the primary centres (excluding Dublin City Centre and Suburban locations) attracting Study Area retail expenditure are:

- i. Carrickmacross;
- ii. Navan; and
- iii. Newry.

In addition, for the purposes of this assessment we include the centre of Ashbourne for comparison.

The analysis of competing centres is founded on:

- *National Spatial Strategy (NSS), Retail Planning Guidelines (RPG)* and the relevant Regional Planning Guidelines designations
- Retailer Representation
- Scale of Attraction and Conclusions.

### **D.2 NSS, RPG and Retail Planning Guidelines Designations**

Table D.1 sets out each of the comparator designations and compares them against the centres of Dundalk, Drogheda and Ardee. The table illustrates that Dundalk and Drogheda are higher level centres than their surrounding competing centres in the Republic of Ireland. Newry is designated a 'Main Hub' and 'Major Inter Regional Gateway' in the *Regional Development Strategy for Northern Ireland 2001* (RDS NI) and as such should be regarded a centre of equal standing – based on statutory policy designations – to Dundalk. Table D.1 identifies that Ardee and Carrickmacross share the Urban Strengthening Opportunity classification for towns of between 1,500 and 5,000 inhabitants.

It should be noted that the RDS NI identifies Newry as having a major inter-regional gateway role, with major tourism development opportunity. Its location in close proximity to the Mourne Area of Outstanding Natural Beauty (AONB) and the Ring of Guillion AONB provides a good opportunity for developing its tourism function. Newry provides a centre for the concentrated development of industrial, commercial, health, education and community services. The RDS NI recognizes that Newry is well placed in relation to the Regional Strategic Transport Network, which is an advantage to its future development, with main routes to Banbridge, Lisburn, Belfast and across the border to Dundalk and Dublin.

Based on the rate of development witnessed in Navan since the publication of the RPG Hierarchy Navan would now be classified a Tier 3 Level 1 Centre while Ashbourne would be designated a Tier 3 Level 2 Centre. The accelerated level of these settlements over the past decade is consistent with their proximity to the wider Dublin conurbation and their strategic locations upon the N2 and N3 transport corridors.

<b>Table D.1 National Designations</b>		
<b>Centre</b>	<b>National Spatial Strategy/ Regional Planning Guidelines</b>	<b>Retail Planning Guidelines</b>
Dundalk	Gateway	Tier 3 Level 1
Drogheda	Primary Development Centre	Tier 3 Level 1
Ardee	1,500 – 5,000 Inhabitant Town Urban Strengthening Opportunity	Tier 4
Carrickmacross	1,500 – 5,000 Inhabitant Town Urban Strengthening Opportunity	Tier 4
Navan	Primary Development Centre County Town	Tier 3 Level 1 <sup>1</sup>
Ashbourne	>5,000 Inhabitant Town	Tier 3 Level 2 <sup>2</sup>
Newry	Main Hub Major Inter Regional Gateway <sup>3</sup>	-
Note: <sup>1</sup> Navan is identified as a Tier 3 Level 2 centre in the Retail Planning Guidelines Hierarchy but based on current population and retail offer it is a Tier 3 Level 1 Centre <sup>2</sup> Ashbourne is not identified as a Tier 3 Level 2 centre in the Retail Planning Guidelines Hierarchy but based on current population and retail offer it is a Tier 3 Level 2 Centre <sup>3</sup> Regional Development Strategy for Northern Ireland (2001)		

Source: National Spatial Strategy (2002), Regional Planning Guidelines for the Border Region (2004), Regional Planning Guidelines for the Greater Dublin Area (2004), Retail Planning Guidelines (2005) and Regional Development Strategy for Northern Ireland (2001)

Table D.1 also highlights the unique position of Dundalk and Newry relative to the other centres considered. The proximity of two 'Gateway' locations on either side of border along the well developed M1/A1 road and rail corridors offers the potential for a high degree of complementary commercial development over the longer term.

### **D.3 Retailer Representation**

The range of retailers available in the comparator centres of Ashbourne, Carrickmacross, Navan and Newry are highlighted in Table D.2. Ashbourne represents an attractive convenience shopping location due to the range of convenience retailers available, their proximity to each other and good car parking facilities. Ashbourne's attractiveness as a retail location does not extend into comparison goods or retail warehousing, although this may change slightly with the full opening of the Ashbourne Retail Park over the remainder of 2008.

Navan's rapid expansion over the period since 1996 has resulted in a slightly unbalanced retail offer as the town's retail offer attempts to keep pace with the rapid population growth. Navan currently suffers from a relative lack of modern format convenience floorspace. However, Navan's primary

attraction for a small proportion of County Louth residents relates to high street comparison floorspace which has been underpinned by the recent extension to the Navan Shopping Centre. Carrickmacross acts as a local service provider with the recently opened Lidl increasing the attractiveness of the town as a centre for convenience shopping.

<b>Table D.2 Retailer Representation</b>				
<b>Type of Floorspace</b>	<b>Ashbourne</b>	<b>Carrickmacross</b>	<b>Navan</b>	<b>Newry</b>
Convenience	Dunnes Stores Tesco Aldi Lidl Supervalu	Supervalu Lidl Various Symbol Stores	Dunnes Stores Tesco Supervalu Various Symbol Stores	Dunnes Stores Sainsbury's Marks and Spencer's Lidl
Comparison	Very Limited Range of High Street retailers including: Sasha Neu Look	Predominantly independent retailers	Good Range of High Street retailers including: Argos Penney's A-Wear Boots	Very Good range of High Street retailers including: Debenhams Boots Next Primark Waterstones
Retail Warehousing	Ashbourne Retail Park anchored by 4 Home Superstore	None	Out of Centre Locations such as: Blackwater Retail Park anchored by Woodies	Out of Centre Locations such as: Newry Retail Park anchored by B&Q

Source: Tom Phillips + Associates (2008)

Even a simple matrix as provided in Table D.2 highlights the relative attraction of Newry as a shopping location for North Louth residents. Section 6 of our Report and Appendix C identify Newry as the primary destination of retail expenditure leakage from the North Louth and Dundalk areas. The proximity of Newry to these areas is complemented by a range of retailer representation not only on a par with that provided in Dundalk, but also several international retailers not available in Dundalk or the wider North Louth area. These retailers include Sainsbury's, Debenhams, Waterstones and Marks and Spencer's which are all located in close proximity to each other in the Buttercrane and Quayside Shopping Centres.

#### **D.4 Scale of Attraction**

Our assessment indicates that Dundalk, Drogheda, Newry and Navan will continue to develop as key commercial centres in accordance with the overarching objectives of both the NSS and RDS NI. Dundalk and Newry currently possess the necessary statutory designations, population base and road/rail infrastructure to further increase their commercial synergies over the longer term – a shared retail strategy for these areas may provide a first step. The smaller settlements of Ardee, Carrickmacross and Ashbourne will develop

as more localised retailing centres servicing the needs of their immediate hinterland populations.

Navan has reached a level of population close to Dundalk and Drogheda in 2006. Over the medium term Navan's potential for growth will remain strong with continuing investment in the N3 Road and Rail Transport Corridors notwithstanding its designation in the Retail Planning Guidelines. The completion of the N2 Ashbourne Bypass has consolidated the town's position as a dormitory residential location for Dublin City. Ashbourne's retail offer has improved substantially in the period 2002 and now includes a dedicated retail warehousing park and a wide range variety of convenience shopping locations. Ashbourne has an attractive retail offer relative to other similarly sized centres throughout the country.

As set out Section 6 and Appendix C the proportion of Study Area residents undertaking retail trips in Carrickmacross, Navan and Ashbourne is small and is likely driven by proximity due to work or family commitments. However, the survey data also shows the very real attraction of Newry as a retail location for North Louth and Dundalk residents. This attraction remains strong - particularly for main food and clothing/footwear shopping – notwithstanding the growth in Dundalk's retail floorspace over the same period. Within Dundalk, such leakage can only be addressed through a comprehensive set of retail policies designed to increase the attractiveness both of Dundalk Town Centre and the quality and quantum of the town's existing retail offer. These policies are set out in Sections 8 and 9 of this Report.

Newry's attraction is also aided by the favourable exchange rate regime offered by individual retailers and what is perceived to be easy accessibility/good car parking facilities including free car parking at Quayside Shopping Centre. Newry's attraction is likely to remain strong over the medium term given continuing infrastructural improvements along the M1/A1 road corridor and the potential further development of its retail offer as befitting its designations in the RDS NI.