Floorspace Capacity Assessment for Retail and Service Uses in Cherrywood Town Centre

Prepared on behalf of
Dùn Laoghaire-Rathdown County Council

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Executive Summary

This report assesses the minimum and maximum capacity for retail and service use development in Cherrywood Town Centre by the year 2030. Within the County, Cherrywood has the status of a Town/District Centre in the retail hierarchy, which is a level below Dun Laoghaire and Dundrum, both of which are designated as Major Town Centres.

Minimum floorspace capacity is largely based on the assumption that Cherrywood will function as a self-sufficient, sustainable town/district centre within the Greater Dublin Area. Its catchment in the year 2030 is projected to consist of 31,250 residents and 18,135 non-resident workers, the latter of which will make a proportional contribution to expenditure levels in the catchment.

Maximum floorspace capacity assessment builds upon the above and also considers the possibility of an inflow of expenditure into Cherrywood from designated New Residential Communities in the county. These include Ballyogan & Environs and Kiltiernan-Glenamuck to the west of Cherrywood, as well as Rathmichael, Old Connaught and Woodbrook-Shanganagh to the south of Cherrywood. They are all broadly located within 10 minutes' drive of Cherrywood Town Centre, and it is therefore reasonable to assume that a proportion of the expenditure generated by this new residential population (34,115 persons) at these location would be attracted to Cherrywood.

Retail uses in this assessment are defined as convenience (grocery) goods; comparison (durable) goods, as well as retail services. Retail services primarily focus on selling a service rather than selling goods, such as hairdressers, repair shops, etc.

Service uses include food and beverage units, leisure services and financial and professional services. They are generally small to medium size in scale and typically provide a direct service to the public on the high street.

Other non-residential uses such as educational and community use, together with health, public/institutional uses and hotel space, constitute additional floorspace to this assessment and do not form part of the calculations.

Based on a range of information sources pertaining to the economy, population change, expenditure, turnover and floorspace mix in other town/district centres this capacity assessment estimates the following minimum and maximum floorspace requirements for retail and service use in Cherrywood Town Centre (Table 1).

Table 1

Projected Min-Max Retail and Services floorspace capacity in Cherrywood TC 2030				
	Use category	**Min gsm**	**Max gsm**	**%**
Retail	Convenience retailing	12,062	14,362	23.7%
	Comparison retailing	13,737	18,059	29.8%
	Retail service	4,053	5,094	8.4%
	Retail subtotal	**29,852**	**37,515**	**62.0%**
Services	Food & Beverage	7,234	9,091	15.0%
	Leisure service	7,234	9,091	15.0%
	Financial & professional service	3,828	4,811	8.0%
	Services subtotal	**18,296**	**22,992**	**38.0%**
	Total gross sqm	**48,149**	**60,507**	**100%**

Having regard to the convenience goods floorspace projection range of 12,062-14,362 gross sqm, Cherrywood Town Centre could, in theory, accommodate two food superstores with a maximum net floorspace of 4,000 net sqm (as per the cap in the retail planning guidelines).

In terms of comparison goods floorspace, the assessment estimates a requirement for 13,737 – 18,059 gross sqm, which offers appreciable scope to accommodate a range of retailers selling durable goods such as clothes, footwear, leisure goods and household items.

Retail services comprise an additional 4,053 – 5,094 gross sqm of floorspace.

As for service uses, the capacity assessment estimates a total floorspace requirement for 18,296 – 22,992 gross sqm in respect of food and beverages, leisure service and financial/professional service uses. These uses mainly cater for the needs of people when eating and drinking out, socialising, entertainment and recreation.

In terms of scale, it is worth noting that the minimum level of retail and service floorspace projected for Cherrywood Town Centre will be over two and a half times the size of Stillorgan Village Centre.

The overall gross floorspace figures for both retail and service use in this capacity assessment (48,149 – 60,507 gross sqm) are appreciably lower than those forecasts recorded in the Planning Scheme for Cherrywood (81,894 – 100,909 gross sqm). This difference is attributed to a combination of factors, including:

- the inclusion in the planning scheme figures of floorspace uses other than retail and service uses, such as a library, primary care centre, etc. Their inclusion inflates the floorspace projections in the Planning Scheme.
- a more focussed assessment in the capacity assessment of the expenditure contribution of non-resident workers in sustaining retail floorspace;
- the adoption of a modern net to gross ratio in the capacity assessment (75:100), as opposed to 66:100 in the Planning Scheme, when converting net floorspace to gross floorspace; and
- the increasing role of online retail sales, post-covid, especially for comparison goods shopping.

While it is acknowledged that the projection of floorspace requirements is not an exact science and is subject to the vagaries of economic and societal change, the findings of this assessment should still be viewed as broad guidance for the development of retail and service uses at Cherrywood.

1.0 Introduction

This report assesses the capacity for retail and service use development at Cherrywood Town Centre. It is prepared by Braniff Associates on behalf of Dùn Laoghaire-Rathdown County Council in order to provide an independent, evidence-based understanding of the potential of the area for such uses. In so doing, it is intended to guide the forward planning of the settlement and the evaluation of proposals therein.

2.0 Scope of Report – Classification of Uses

The findings of this Capacity Assessment are advisory in nature and are intended to inform the plan-led approach to the development of Cherrywood.

The retail and service uses that are the subject of calculations in this Assessment are described in subsections 2.1 and 2.2 below. The floorspace requirements of other non-residential uses such as health, community and educational uses cannot be quantified in this assessment. Unlike retail and service uses, their provision does not relate to levels of disposable income and is largely determined by the specific accommodation requirements of the respective organisational bodies involved.

2.1 Retail uses

Retail uses are commonly defined as convenience goods and comparison goods. For the purposes of this assessment and in keeping with the Planning Scheme for Cherrywood retail services are also subsumed under the category of retail uses.

Convenience goods
Convenience goods are mainly groceries and other consumable commodities that are purchased regularly and usually locally. They include food, drinks (including take home alcoholic drinks), tobacco, newspapers, magazines, cleaning materials and toiletries. Shopping for convenience goods is often simply referred to as food shopping.

Comparison goods
Comparison goods are durable items for which customers are prepared to travel some distance to compare prices and quality. They include clothes, footwear, household durables (both bulky and non-bulky) and leisure goods.

Retail services
Retail service units primarily focus on selling a service rather than selling goods. This category is exemplified by hairdressing and personal care outlets, repair shops, dry cleaners, travel agents, post offices, tattooists and clothes hire shops.

2.2 Service uses

Service uses include food & beverage services, leisure services and financial and professional services. Each of these uses is described in further detail below.

Food & beverage services
Food & beverage services cater for the needs of people in terms of providing prepared meals/drinks and include restaurants, cafes, coffee shops and fast food takeaways.

Leisure services
Leisure service uses refer to small to medium sized outlets that cater for the needs of people in terms of socialising, entertainment and recreation. It includes public houses, betting offices and gaming centres. Larger establishments which can distort floorspace projections are not included in this assessment and can be considered as additional floorspace. This could include a cinema, gym, leisure centre, nightclub, bingo hall, bowling alley, swimming pool, entertainment centre, ice hockey rink, etc.

Financial and professional services
Financial and professional services include small to medium sized professional offices, bank branches, building society branches, solicitor's offices, financial advisors, auctioneers, etc. They typically form part of the high street profile of shopping/commercial areas and mainly interact with the public via own-door, ground-floor premises.

This category excludes office development that does not provide a direct service to the public by actively engaging with customers on the high street. Such offices are usually larger in size, more back-room in profile and less reliant on the need for commercial visibility.

2.3 Other non-residential uses

Other non-residential uses primarily relate to: community buildings; educational facilities such as libraries and creches; health sector outlets such as primary care centres, GP surgeries, etc; and public service uses such as a Garda station, Council office, etc.

3.0 The approach to assessment

The capacity to develop retail and service uses in Cherrywood Town/District Centre is projected in accordance with the following 2-step methodology.

1st Step – Calculate Retail Floorspace requirement

This involves undertaking a quantitative supply and demand analysis for retail floorspace. This analysis is largely based on the interplay of projections relating to the catchment population, retail expenditure and the turnover of shops.

A number of information sources can be consulted to assist in calculating retail floorspace requirements. These include:

- National figures on retail expenditure, sales growth and population growth. These consist of Central Statistics Office (CSO) publications including: Household Budget Survey 2016; Annual Services Inquiry 2022; National Income and Expenditure Report 2020; Central Bank Quarterly Bulletins and Population; and Labour Force Projections 2017-2051.

- UK sources are consulted in instances where Irish ones are lacking, namely on retail turnover, online shopping levels and floorspace mix in Centres. Sources include Experian's Retail Planner Briefing Note 21, Feb 2024 relating to turnover and online shopping, together with Experian GOAD's Retail Centre Report 2022 on floorspace mix. UK Turnover figures are converted to Irish figures by factoring in the currency differential and the difference in the cost of living.

2nd Step – Calculate Services Floorspace requirement

Building upon the projected retail floorspace figures above the proportional floorspace breakdown of service uses can then be estimated on a pro rata basis. This is based on the percentage mix of such uses typically found in the centre of settlements, as provided by Experian GOAD.

The above steps are explained in greater detail in subsequent sections of this report.

4.0 Planning and Retail Context

In order to gain an understanding of the broad planning and retail parameters relevant to this assessment reference is made to the following national, regional and local documentation below.

4.1 National Planning Framework - Project Ireland 2040

With its focus on promoting balanced, sustainable growth across the island the National Planning Framework specifically highlights Cherrywood as one of the key future growth enablers for Dublin City and the Metropolitan Area within the Eastern and Midland Region. It states the following:

"*Progressing the sustainable development of new greenfield areas for housing, especially those on public transport corridors, such as Adamstown, **Cherrywood**, Clonburris and Clongriffin;"* [1]

The National Planning Framework espouses a holistic approach to planning in order to ensure that residential and employment development is adequately served by transport, infrastructure and amenities. The preparation of this capacity assessment can be acknowledged as one component of the holistic approach taken by Dùn Laoghaire-Rathdown County Council in planning for the Cherrywood Strategic Development Zone.

4.2 Regional Spatial & Economic Strategy, Eastern & Midland Regional Assembly, 2019-2031

Under the Regional Spatial & Economic Strategy (RSES) and the Dublin Metropolitan Area Strategic Plan (MASP) Cherrywood is recognised as a Strategic Development Area for population and employment growth on the Metrolink/LUAS Greenline Corridor (Figure 1). It is considered one of a number of "*Mixed-use districts with significant retail and people intensive employment to complement the city centre and docklands*" [2]

Figure 1

Source: Figure 5.2 Dublin Metropolitan Area Strategic Plan, p103

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[1] p37, Project Ireland 2040 - National Planning Framework

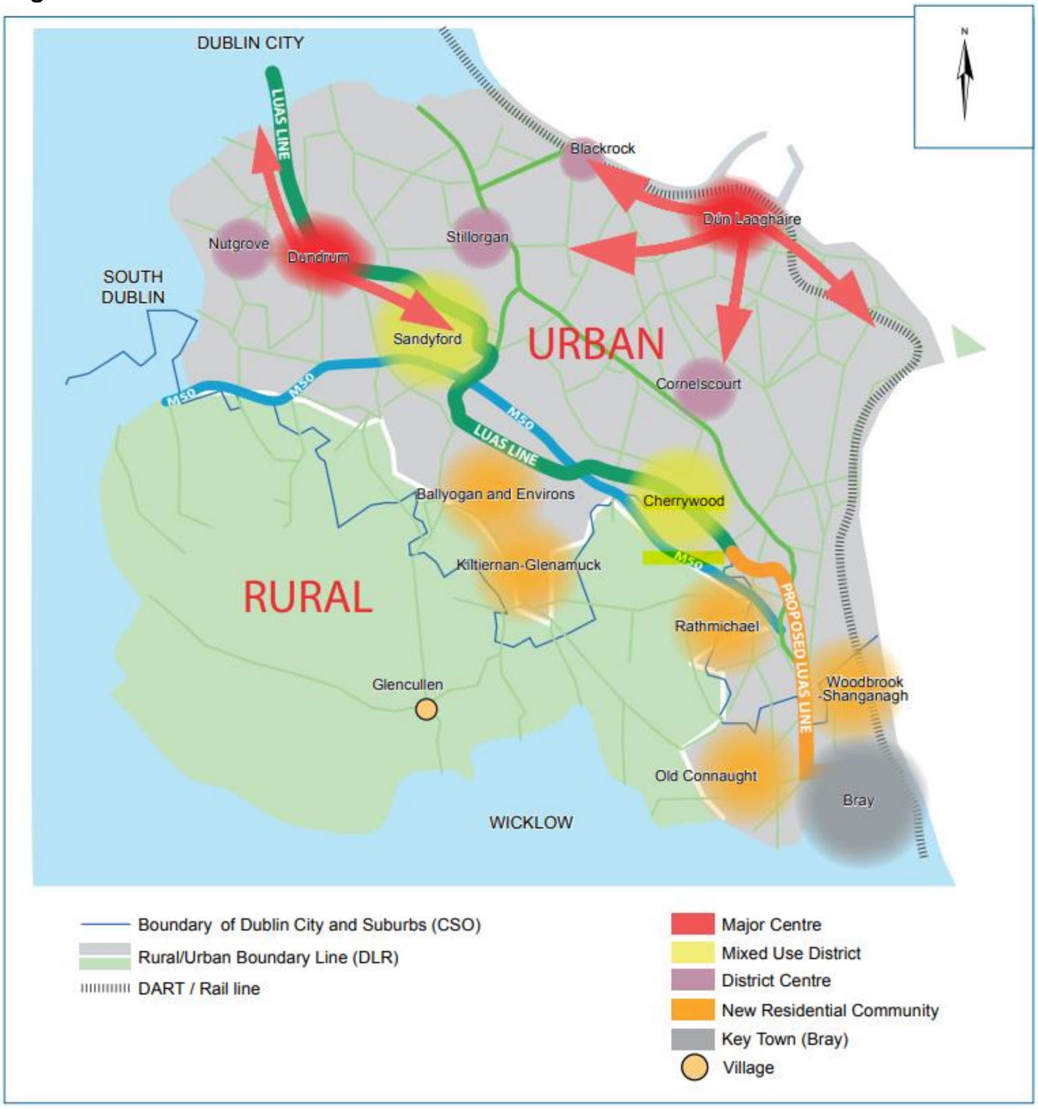
[2] Table 5.2, p115, Regional Spatial & Economic Strategy, Eastern & Midland Regional Assembly, 2019-2031

4.3 Dún Laoghaire-Rathdown County Development Plan 2022-2028

The Core Strategy Map in the Dún Laoghaire-Rathdown County Development Plan 2022-2028 (CDP) identifies Cherrywood as an emerging Mixed Use District (Figure 2).

Cherrywood was designated as a Strategic Development Zone (SDZ) in 2010 in recognition of its potential to be a major new residential and employment settlement in the County and the wider region. A Planning Scheme for the SDZ was approved by An Bord Pleanála in 2014 and it has been subject to a number of subsequent amendments since then.

Figure 2



Source: Figure 2.9, Core Strategy Map

The CDP designates Cherrywood as a Level 3 District Centre as per the regional guidelines, where the overall strategy and policy objective (RET6) is to "*Support the ongoing development of a fully mixed-use sustainable town centre in accordance with the approved SDZ Planning Scheme*." [3]

In this respect, it is on the next tier of the retail hierarchy below Dublin City Centre (Level 1) and Dun Laoghaire and Dundrum (Level 2), both of which are designated as Major Town Centres (Figure 3).

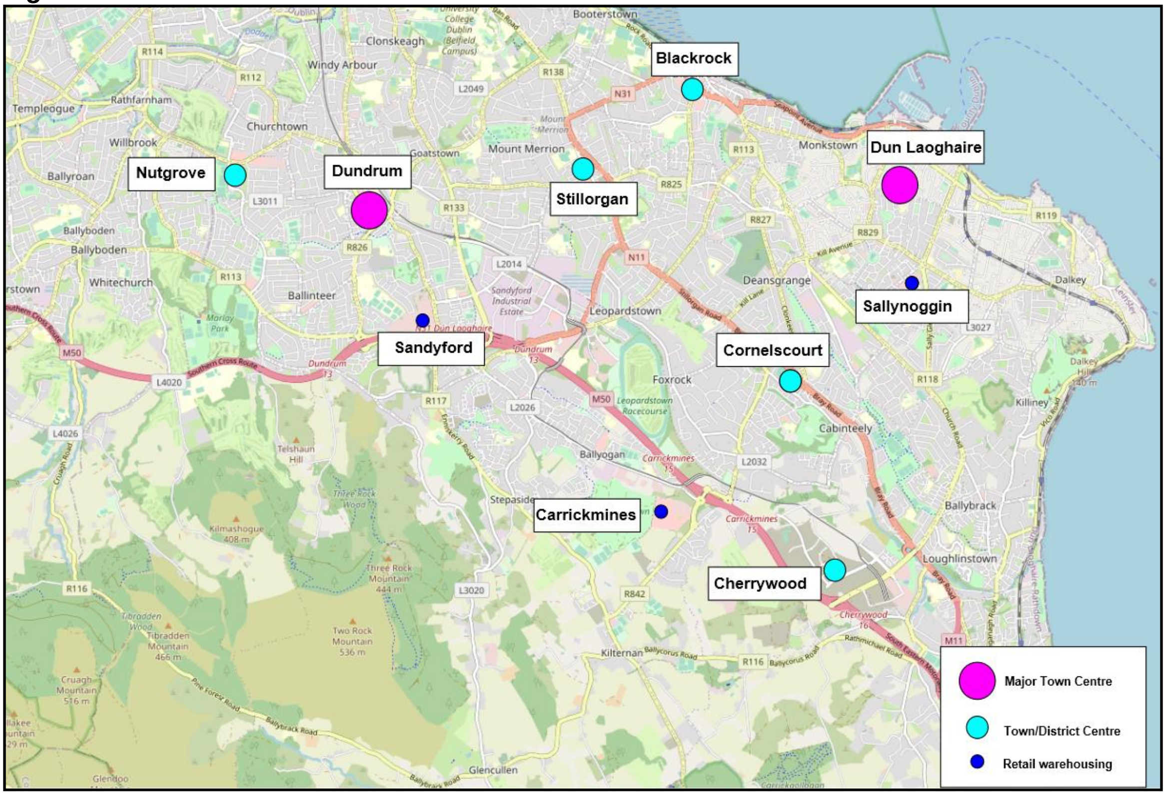
[3] p147, Dún Laoghaire-Rathdown County Development Plan 2022-2028

Outside of town and district centres Figure 3 also indicates that groupings of retail warehousing exist at Sandyford, Sallynoggin and Carrickmines, with the latter also designated as a Neighbourhood Centre.

Other designated District Centres in the County include Cornelscourt; Stillorgan, Blackrock and Nutgrove. The CDP contains specific objectives to cap retail floorspace at 20,000-25,000 net sqm in these District Centres. [4]

The CDP underlines the multi-functional role of district centres and expressly states specific objective MFC 1 in support of this role. [5]

Figure 3



4.4 Cherrywood Planning Scheme

Prepared in 2014 the Cherrywood Planning Scheme quantifies a mix of uses for Cherrywood Town Centre across four quadrants and outlines an Urban Form Development Framework (UFDF) to guide its development. The quantum of floorspace for retail and non-retail use is tabulated in Table 1 and the Planning Scheme states a maximum retail floorspace figure of 27,000 net sqm. This equates to 40,000 gross sqm based on a 66:100 net to gross floorspace ratio applied in the Planning Scheme at that time.

The category of non-retail uses is not specified in the Planning Scheme but it can be assumed to include the three categories of service uses outlined in this capacity assessment, namely food & beverage services, leisure services and financial and professional services.

In terms of other non-retail and non-service uses there are specific objectives in the Planning Scheme to provide a community facility (DA 16), Library (DA 17) and primary care centre (DA 18). The high profile corner of TC2 is also recommended as a suitable location for a hotel.

[4] p153, Dún Laoghaire-Rathdown County Development Plan 2022-2028
[5] p142, ibid

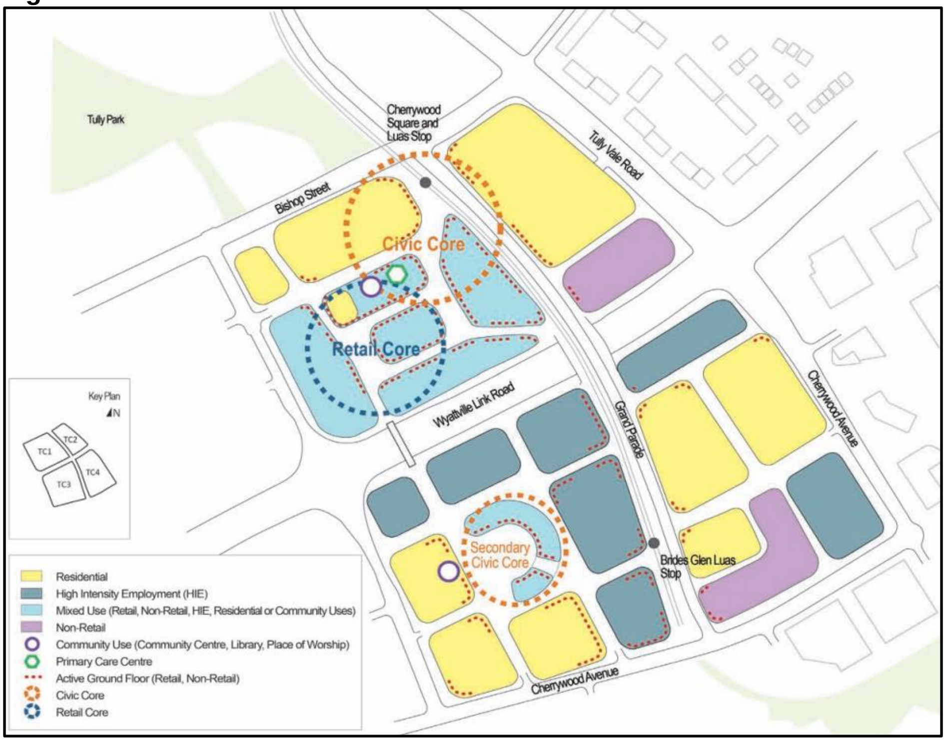
Table 1

Cherrywood Town Centre		
	Gross sqm	
	Min	**Max**
Retail		
Convenience	3,030	6,060
Comparison	24,485	26,667
Retail services	6,879	8,182
Subtotal	**34,394**	**40,909**
Non-retail		
Non-retail uses	47,500	60,000
Total	**81,894**	**100,909**
Source: Table 6.2.1, Cherrywood Planning Scheme		

The land use zoning matrix in Appendix A of the Planning Scheme indicates those uses that will not normally be permitted in the town centre. These include: retail park, retail warehouse, petrol station, motor sales outlet, garden centre and cash'n'carry/wholesale outlet.

The land use strategy for the UFDF proposes that Quadrant TC 1 serves as the principal commercial core (Figure 4). It states that "*Approximately one third of TC1 is retail use, providing a mix of traditional convenience and comparison retail uses and complimentary retail services. The principal retail focus is positioned centrally within TC1 backing onto the Wyattville Link Road, fronting onto Grand Parade and opening up into a network of spaces including the Town Square (East and West), the wide pedestrian street which runs east to west across TC1, namely Civic Street and Cherrywood Square, and overlaps with the principal focus and civic core*." [6]

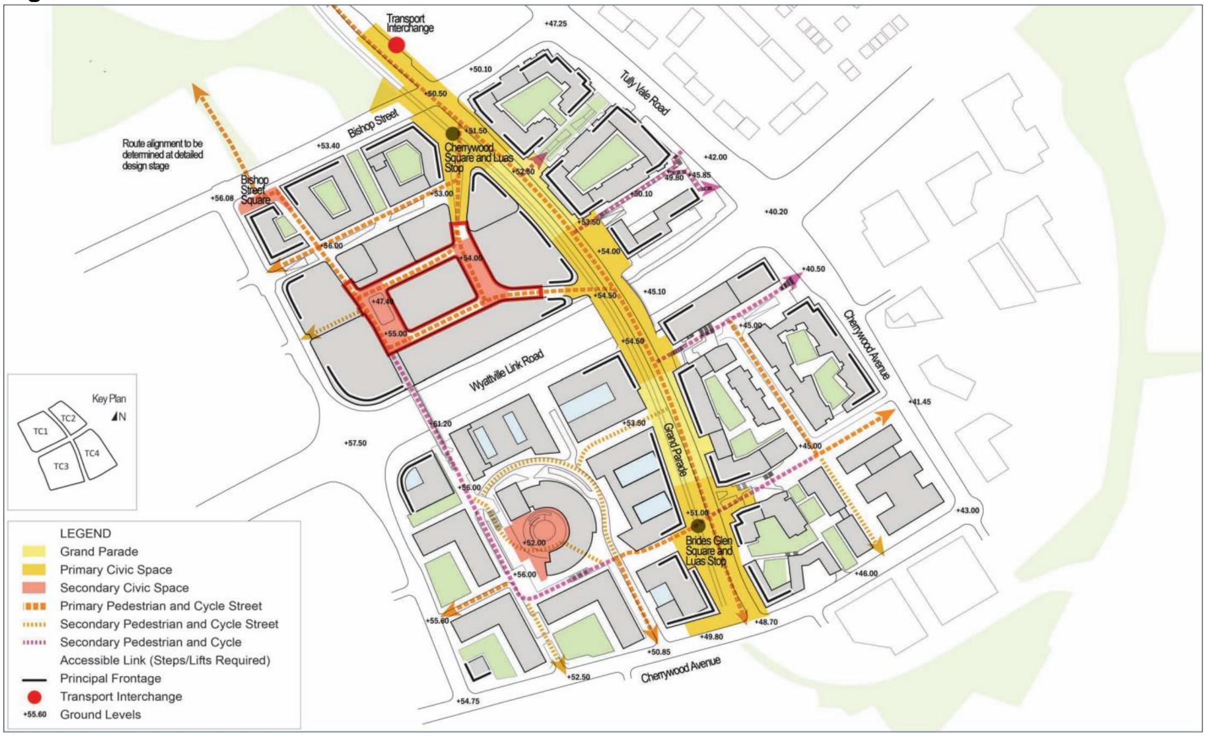
Figure 4



[6] P9, Cherrywood Town Centre Urban Form Development Framework

The indicative block plan for the UFDF highlights that Grand Parade, which accommodates the route of the LUAS, is intended to be the Primary Civic Space in the town centre (Figure 5). A pedestrian footbridge over the Wyattville Link Road is also proposed to connect quadrant TC1 and TC3.

Figure 5



Source: Map 3: Block Layout, New Ground Levels and Principal Frontages

4.5 Retail Planning Guidelines for Planning Authorities, 2012

The national Retail Planning Guidelines underline the need for retail policies and objectives in the Development Plan to be "evidence-based" [7]

The Retail Planning Guidelines do not provide guidance on the appropriate size for a District Centre, in terms of the required level of retail and commercial floorspace that is considered appropriate. They mention in Section 2.2.4 that District Centres are usually a feature of an area containing 10,000 people or more.

Section 3.4 of the Retail Planning Guidelines explains that District Centres are suitable for a mix of uses and should not function simply as shopping locations in their own right:

"*The role of a district centre is to provide a range of retail and non-retail service functions (e.g. banks, post office, local offices, restaurants, public houses, community and cultural facilities for the community at a level consistent with the function of that centre in the core strategy.* ***They should not serve as a retail destination in their own right sufficient to adversely impact on the city/town centre to which they are subservient.*** *They can be purpose built serving new or expanding suburbs or traditional serving long established communities."*

Moreover, the Guidelines stipulate that the significant extension of a District Centre should be premised on significant population growth or a demonstrable level of under-provision of retail space:

"*The need for additional retail development in particular district centres to serve future population growth or for any significant extension to an existing district centre should be identified in the development plan and be based on a significant growth in population in the intended location or on a*

[7] p20, Retail Planning Guidelines for Planning Authorities, 2012

demonstrable level of under-provision of retailing or other services to meet the regular convenience and lower order comparison shopping needs of new communities as provided for and quantified by the relevant core strategy." [8]

Significant population growth is envisioned for Cherrywood and, understandably, this capacity assessment seeks to assist the County Council in planning for the retail and service use needs of this population.

The Guidelines also outline floorspace caps for convenience retail, retail warehousing and petrol filling station shops and proposed retail development at Cherrywood would have to comply with these. These include a cap of 4,000 net sqm for convenience floorspace, with no cap on the comparison goods floorspace. The Guidelines also stipulate a 6,000 net sqm cap on retail warehouse units and 100 net sqm cap on retail space linked to filling stations, though these types of retail development are not envisaged for Cherrywood Town Centre under the Planning Scheme. [9]

4.6 Retail Strategy for the Greater Dublin Area 2008 – 2016

As with the national Retail Planning Guidelines the Retail Strategy for the Greater Dublin Area (RS GDA) refers to the 10,000 population figure for designation of a Level 3 Centre, which is the tier of hierarchy associated with District Centres. It also refers to a maximum floorspace guidance figure of 20,000 sqm of net retail provision in a District Centre, with potential to extend this maximum figure by 10-15,000 sqm of lettable floorspace in high density locations, which presumably would apply to Cherrywood. This is recalled below.

"*As part of the review of the 2001 Retail Strategy it was proposed that consideration be given to the sub-division of the Level 3 tier into two further sub-categories to reflect the different functions and size of the centres. This was not included as it could over complicate and restrict the development of centres unnecessarily. However, for a certain limited number of district/sub-county town centres within Level 3, located or proposed for areas of extensive and intense high density development providing for new towns/areas of over 10,000 population, the guideline of a maximum of 20,000 sqm net of retail provision can be extended by 10-15,000 sqm of lettable floor space to reflect the dense urban character of the development and the high population located within a short walking distance of the centre- where the area is not already served by an existing centre. Clear justification will need to be included in any City/County retail strategy outlining the case to support such a designation*." [10]

The retail floorspace figure of 20,000 net sqm referred to above originates from an earlier version of the Retail Planning Guidelines for Planning Authorities, dated January 2005. [11]

The RS GDA also outlined the broad retail floorspace projections for Dun Laoghaire Rathdown County Council (DLR CC) for the period 2008-2016 and these are distilled in Table 2. While these figures are clearly out of date, they did indicate that, outside of Dublin City Council, DLR CC was anticipated to

Table 2

Retail floorspace projections for Dun Laoghaire Rathdown CC up to 2016		
	Gross lettable sqm*	
Convenience goods	28,555	34,266
Comparison goods	96,227	157,463
* *Excludes mall/circulation space*		
Source: Tables 5.7, 5.8, 5.9 and 5.10 of the GDA Retail Strategy 2008 - 2016		

have the biggest increase in comparison goods floorspace of all the counties in the GDA.

[8] Section 3.4, Retail Planning Guidelines 2012
[9] p13, ibid
[10] Paragraph 6.11, Retail Strategy for the Greater Dublin Area 2008-2016
[11] Paragraph 71, Retail Planning Guidelines for Planning Authorities, January 2005

4.7 Urban Development and Building Heights Guidelines for Planning Authorities, Dec 2018

In keeping with the National Planning Framework's desire for the development of compact cities these guidelines recognise that higher densities are pivotal to the creation of sustainable locations equipped with a critical mass of employment, services and retail opportunities. This is reflected in the quotes below.

"*While achieving higher density does not automatically and constantly imply taller buildings alone, increased building height is a significant component in making optimal use of the capacity of sites in urban locations where transport, employment, services or retail development can achieve a requisite level of intensity for sustainability*." [12]

One of the Specific Planning Policy Requirements (SPPR) of these guidelines states that:
"*In driving general increases in building heights, planning authorities shall also ensure appropriate mixtures of uses, such as housing and commercial or employment development, are provided for in statutory plan policy*." [13]

4.8 Key messages from the Review of Planning and Retail context

Based on the above review of the planning and retail context pertaining to Cherrywood the following points can be highlighted.

Scale
The maximum retail floorspace figure stated in the Cherrywood Planning Scheme amounts to 27,000 net sqm or 40,000 gross sqm. This includes convenience, comparison and retail services floorspace.

Allowing for differences in the definition of net floorspace and lettable floorspace the above figure broadly tallies with the maximum range of 30-35,000 sqm of lettable floorspace stipulated in the GDA RS for high density District Centre locations such as Cherrywood.

Size of units
The Retail Planning Guidelines outline a floorspace cap for convenience retail units of 4,000 net sqm, with no cap on comparison goods units.

Uses
Regional and local policy recognises that the vitality of town and district centres is dependent on the development of a mixed use, multi-functional town/district centre.

The Planning Scheme contains specific objectives to provide a community facility (DA 16), Library (DA 17) and primary care centre (DA 18), while hotel use is also recommended.

The land use zoning matrix in Appendix A of the Planning Scheme outlines those uses that will not normally be permitted in the town centre. These include: retail park, retail warehouse, petrol station, motor sales outlet, garden centre and cash'n'carry/wholesale outlet. The inference from the zoning matrix is that large, single storey town centre operators will not be countenanced at Cherrywood.

Layout
The Urban Form Development Framework (UFDF) for Cherrywood identifies TC 1 as the Retail Core of Cherrywood, with a secondary Civic Core in TC 3 on the opposite side of the Wyattville Link Road. The UFDF emphasizes the importance of creating active ground floor street frontages in the Town Centre in order to promote vitality and to engender a sense of place.

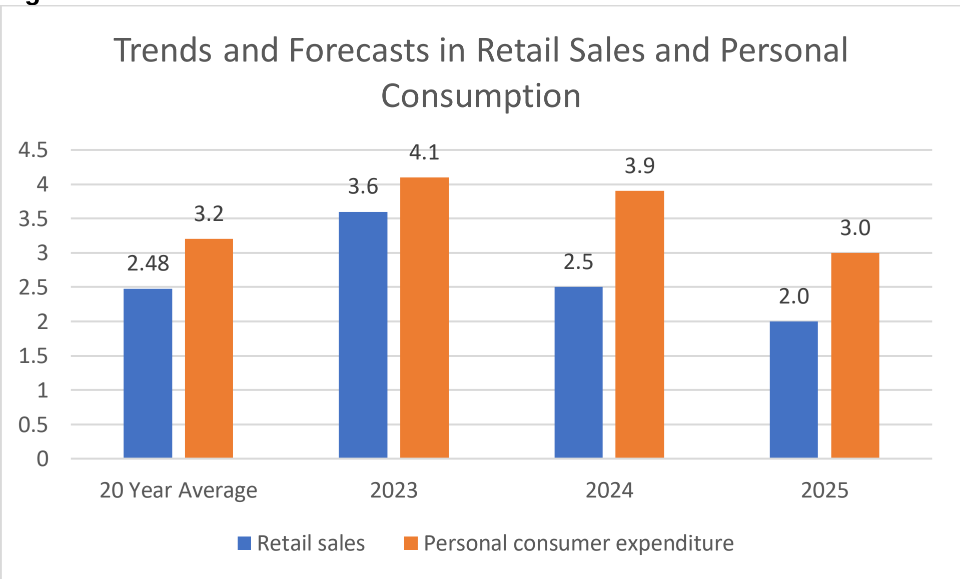
[12] Para 2.3, p7, Urban Development and Building Heights Guidelines for Planning Authorities, December 2018
[13] p11, ibid

5.0 Economic Outlook

The Covid pandemic has cast a light on the vagaries of the marketplace and its susceptibility to unforeseen shocks. Accordingly, it is imperative that economic forecasting is based on long term historical trends that reflect the upturns and downturns in retail and non-retail activity.

Figure 6 below has been formulated from a number of economic sources. These include the Central Bank Quarterly Bulletin, Sep 2023, in respect of information on personal consumer expenditure, as well as from Trading Economics for retail sales forecasts. This information was then benchmarked against the National Income and Expenditure Report 2020. Given the uncertainty surrounding future economic predictions it should be noted that most economic forecasts are only made for the next few years. Figure 6 indicates that real change in retail sales is projected to be 2.0% in 2025. The corresponding rate for the service industry, as reflected in the personal consumption figures, is 3.0%.

Figure 6



6.0 Minimum capacity for retail floorspace at Cherrywood

The ensuing analysis is predicated on the understanding that Cherrywood is intended to function as a self-sufficient, sustainable location within the Greater Dublin Area. The figures produced on this basis represent the **minimum** floorspace requirement for Cherrywood Town Centre. The maximum floorspace requirement is considered in Section 7.0 of this report.

6.1 The catchment population

The catchment population of Cherrywood consists of both residents living in Cherrywood and workers drawn to the area. These are detailed below.

Resident population
The capacity for additional retail and service floorspace is assessed on the basis of the projected population for Cherrywood, as outlined in the Planning Scheme and subsequent amendments. This amounts to 31,250 persons, which is derived from the application of a household size of 2.5 persons to the 12,500 residential units anticipated to be built.

Non-resident employee population
Added to the above, it is considered that the substantial number of employees in the area are likely to bolster retail spend in shops in Cherrywood. The number of employees projected for Cherrywood is

20,150 persons, 90% of which (18,135) will comprise non-residents. To date, there is in the region of 2,000-2,500 employees in the area.

It is difficult to retrieve any comparable analysis which sheds light on the contribution of non-resident employees' expenditure to sustaining retail and service use floorspace at a given location. However, one approach to consider is to build upon the concept of top-up shopping, which recognises that people carry out a proportion of their shopping on a daily basis during the working week. At its peak this can amount to 25% of weekly expenditure and this proportion is factored into the analysis to reflect the financial contribution of non-resident employees to the sustenance of shopping floorspace in Cherrywood.

6.2 Retail expenditure

Information at the national level exists for various categories of consumer expenditure. Nonetheless, there is no definitive aggregate breakdowns for expenditure on convenience goods and comparison goods.

Despite this shortcoming, the regularity of expenditure on groceries means that a reasonable estimate can often be made for convenience goods shopping. However, given the irregular, leisure-based dimension to the purchase of durable comparison goods, together with the blurring of the lines between providing a service and selling products, the amount of money spent on these items is more difficult to estimate and is subject to varying interpretations.

Expenditure on Convenience goods (Base year)

One of the most up to date sources of consumer expenditure is the 2016 Household Budget Survey (HBS). It provides a detailed list of expenditure on items per household, which can then be classified into categories of convenience goods and comparison goods. Based on this classification and taking into account the average household size recorded in the HBS (2.78 for the State in 2016) it is estimated that the average person spent €2,459 on convenience goods in 2016. This equated to €47 per week. Figures extrapolated from the Retail Strategy for the GDA (€2,463 in 2016) correspond with the HBS figure and accordingly it will be used as the base value for expenditure projections in this report.

Expenditure on Comparison goods (Base year)

The level of expenditure on comparison goods was likewise based on a figure extrapolated from the Household Budget Survey. It recorded expenditure at €1,938 per head in 2016, which is inclusive of online spend. This is well below the per capita figure recorded in the Retail Strategy for the GDA (€3,240 in 2007). However, this difference can be explained by the fact that the HBS figure adopted for this assessment has been stripped down to exclude expenditure on retail services and leisure services, the floorspace requirements for which are considered separately in this report.

Annual growth in expenditure

When projecting the above expenditure per capita figures for the foreseeable future it is necessary to consider published growth forecasts.

Latest indicators from the National Income and Expenditure Report 2020 would suggest that expenditure on convenience and comparison goods is increasing. Table 3 reveals that between 2015 and 2020 expenditure on convenience goods grew by 2.5% per annum, while expenditure on comparison goods such as clothing, footwear and household durables grew between 3.9 and 4.5% per annum.

Table 3

Expenditure category	Annual change 2015-2020*	Annual real change excluding population increase (1% p.a) #
Food & Non-Alcoholic Beverages (Convenience goods)	3.5	2.5
Clothing and footwear (Comparison)	5.5	4.5
Furnishings, household equipment & household maintenance (Comparison goods)	4.9	3.9

** Extrapolated from Table 14.1 of National Income & Expenditure Report 2020*
 # based on annual growth recorded in Population and Labour Force Projections 2017 - 2051, Moderate population projection scenario M2F2

Based on the above trends, real growth in expenditure on convenience goods and comparison goods up to the year 2030 is projected at 2% and 4.5% per annum respectively.

The application of these real rates of change to the base year expenditure figures above enable the projection of corresponding per capita expenditure figures for the design year 2030. These are €3244.60 and €3,589.07 respectively for convenience and comparison goods and these are incorporated into the analysis in Section 6.5.

6.3 Turnover

The Retail Strategy for the GDA estimates turnover rates achieved by shops at circa €12,000 per net sqm for convenience goods and circa €9,000 per net sqm for comparison goods. Latest figures for the UK[14] predict a similar turnover rate for convenience goods but a lower turnover rate for comparison goods (c 6,000 per net sqm), after the Sterling figures have been adjusted for currency and cost of living differentials. In the interest of consistency, the GDA Retail Strategy turnover figures, aka sales densities, have been adopted for forecasting purposes in this report.

6.4 Impact from internet shopping

Provisional data from the CSO for March 2024 indicates that online shopping accounted for 7.1% of turnover generated by retail sales excluding motor trades, automotive fuel and bars. This is an increase in the 6.8% figure recorded in March 2022. It had reached a peak of 22.7% during the pandemic.

In theory, the growth of online shopping would imply that the need for the physical development of retail floorspace on the ground should decline at a concomitant rate.

However, latest projections from Britain suggest that most online shopping for convenience goods will still involve deliveries and click and collections from existing retail stores as opposed to direct dispatch from distribution warehouses. In relation to comparison goods shopping, the reverse will be the case, in that most online comparison goods shopping will be sourced directly from warehouses as opposed to high street shops.

Viewed in the context of the above, it is estimated that the proportion of sales conducted online in the year 2030 will be 6.5% for convenience goods and 27.8% for comparison goods sales.[15]

6.5 Projection of retail floorspace need

Taking into account the above considerations it is possible to estimate the capacity of Cherrywood to accommodate retail development up to the year 2030 for both convenience goods and comparison goods.

6.51 Convenience Goods

As explained above the following assumptions are adopted for this assessment in Table 2:

- The number of persons in Cherrywood will amount to 31,250 persons by the year 2030.
- The expenditure per capita figure in 2030 for convenience goods shopping will be €3,244.6, giving a total available expenditure of €101m.
- The additional expenditure contribution from non-resident employees (90% of 20,150 employees=18,135) is estimated at €14.7m, which gives a combined expenditure figure of £116m.

[14] Figures 4a and 4b, Experian's Retail Planner Briefing Note 21, Feb 2024
[15] Appendix 3, Experian's Retail Planner Briefing Note 21, Feb 2024

- The final amount of expenditure available for floorspace development, once it is reduced to omit items bought online (6.5%), is €108m.
- When the above expenditure figure is divided by the turnover rate for convenience goods floorspace (€12,000 per net sqm) a retail floorspace requirement of 9,046 net sqm is estimated. This equates to 12,062 gross sqm.

Based upon the above gross floorspace projection of 12,062 sqm, Cherrywood Town Centre could, in theory, accommodate two food superstores with a maximum net floorspace of 4,000 net sqm (as per the cap in the retail guidelines).

6.52 Comparison goods

The same forecasting approach to the assessment of floorspace need can be undertaken for comparison goods shopping in Table 4.

The following assumptions are made in this assessment:

- The expenditure per capita figure in 2030 for comparison goods shopping will be €3,589.07, giving a total available expenditure of €112m.
- The additional expenditure contribution from non-resident employees is estimated at €16.2m. When added to the figure above this increases available expenditure to £128m.
- The total expenditure available, after it is reduced to take into account comparison goods purchased online (27.8% in 2030), is €92.7m.
- When the above expenditure figure is divided by the turnover rate for comparison goods floorspace (€9,000 per net sqm) a net floorspace requirement of 10,303 sqm is estimated. This equates to 13,737 gross sqm of comparison goods floorspace.

Table 4

	Minimum retail floorspace capacity at Cherrywood 2030			
		Convenience goods	**Comparison goods**	
A	**Expenditure per capita**	€3,244.60	€3,589.07	
B	**Projected resident population**	31,250	31,250	
C=A*B	**Expenditure by residents**	€101,393,696	€112,158,414	
D	**Projected employment population from outside Cherrywood #**	18,135	18,135	
E=D*A*0.25	**Expenditure by non-resident employees (25%)**	€14,710,197.44	€16,271,942.75	
F=C+E	**Total expenditure by residents and non-resident employees**	€116,103,893.64	€128,430,357.06	
G	**% spent online**	6.5%	27.8%	
H=F*(100%-G)	**Total expenditure less % online**	€108,557,140.56	€92,726,717.80	
I	**Turnover per net sqm**	€12,000	€9,000	**Total retail**
J=H/I	**Net retail sqm capacity**	9,046	10,303	19,349
K=J*(100/75)	**Gross retail sqm capacity (75% net to gross)**	**12,062**	**13,737**	**25,799**
	# 90% of total employment population based on NTA modelling for 2030			

Based on the 13,737 comparison gross floorspace figure above, Cherrywood Town Centre has appreciable scope to accommodate a range of retailers selling durable goods, including clothes, footwear, leisure goods and household items.

There are no set sizes for stores selling comparison goods but latest trends indicate a preference for larger units, with own-door arrangements that offer operational and servicing flexibility i.e. they are not constrained by the opening hours and servicing commitments of being part of a shopping mall.

7.0 Maximum capacity for retail floorspace at Cherrywood

In the interest of sensitivity testing, it is necessary to consider other considerations that may influence the capacity for retail and service floorspace in Cherrywood. In particular, this includes the potential of Cherrywood attracting custom from designated New Residential Communities in the county. Recognition of this possibility allows for the estimation of a **maximum** floorspace capacity figure.

As shown previously in Figure 2 of this report the accommodation of New Residential Communities is earmarked for five locations in the county. These include Ballyogan & Environs and Kiltiernan-Glenamuck to the west of Cherrywood, as well as Rathmichael, Old Connaught and Woodbrook-Shanganagh to the south of Cherrywood. They are all broadly located within 10 minutes' drive of Cherrywood Town Centre. Floorspace capacity assessments carried out for a number of these destinations indicate that there is potential for a proportion of their expenditure to be captured by Cherrywood Town Centre. This is particularly the case in respect of comparison goods floorspace.

Viewed in the context of the above there is potential to develop 13,646 dwellings in these communities (Table 2.9, CDP) which approximates to 34,115 persons, based on an average household size of 2.5.

It is difficult to confirm the exact proportion of expenditure that is likely to flow into Cherrywood Town Centre from these new communities. However, based on the findings of capacity assessments carried

Table 5

	Maximum retail floorspace capacity at Cherrywood 2030			
		Convenience goods	Comparison goods	
A	Expenditure per capita	€3,244.60	€3,589.07	
B	Projected resident population	31,250	31,250	
C=A*B	Expenditure by residents	€101,393,696	€112,158,414	
D	Projected employment population from outside Cherrywood #	18,135	18,135	
E=D*A*0.25	Expenditure by non-resident employment population (25%)	€14,710,197.44	€16,271,942.75	
F=C+E	Total expenditure by residents and non-resident employees	€116,103,893.64	€128,430,357.06	
G	Projected population of New Residential Communities	34,115	34,115	
H=G*A*0.2 and 0.33	Contribution of expenditure from New Residential Communities (20% CV & 33% CP)	€22,137,894.05	€40,405,562.25	
I	% spent online	6.5%	27.8%	
J=(F+H)*(100%-I)	Total expenditure less % online	€129,256,071.50	€121,899,533.75	
K	Turnover per net sqm	€12,000	€9,000	Total retail
L=J/K	Net retail sqm capacity	10,771	13,544	24,316
M=L*(100/75)	Gross retail sqm capacity (75% net to gross)	**14,362**	**18,059**	**32,421**

 # 90% of total employment population based on NTA modelling for 2030
CV=Convenience shopping and CP=Comparison shopping

out for Kiltiernan and Old Connaught, it would be reasonable to assume that it could amount to a fifth (20%) of convenience goods expenditure and a third (33%) of comparison goods expenditure.

When this additional expenditure is factored into the assessment a maximum floorspace requirement can be calculated in Table 5. It can be seen that the maximum gross retail floorspace at Cherrywood could amount to 32,421 gross sqm.

8.0 Minimum and Maximum capacity for service use floorspace at Cherrywood

The capacity to develop service use floorspace is estimated on the basis of the percentage mix of uses found in a typical town/district centre, as provided by Experian GOAD. Armed with the floorspace figures for retailing, the percentage balance of floorspace uses in Cherrywood Town Centre can then be estimated on a pro rata basis.

GOAD data for 2022 indicates that the typical percentage breakdown of floorspace in a town/district centre accords with the proportions outlined in Table 6. Again, it must be reiterated that these figures exclude non-retail floorspace devoted to community, educational, health and public institutional uses. The percentages below have also been adjusted to exclude vacant floorspace.

Table 6

Percentage mix of retail & services in a typical Town/District centre	
Use category	**% Floorspace***
Convenience retail	18.0%
Comparison retail	35.6%
Retail services	8.4%
Food and Beverage services	15.0%
Leisure services	15.0%
Financial & professional service	8.0%
Total	**100%**

Source: GOAD Centre Report 2022

** Adjusted to exclude vacant floorspace*

When the service use percentages above are applied to Cherrywood Town Centre in conjunction with the calculated retail floorspace figures in Tables 4 and 5, the overall minimum and maximum gross floorspace figures can be stated in Table 7. It indicates a minimum and maximum floorspace

Table 7

Projected Min-Max Retail and Services floorspace capacity in Cherrywood Town Centre 2030				
	Use category	**Min gsm**	**Max gsm**	**%**
Retail	Convenience retailing	12,062	14,362	23.7%
	Comparison retailing	13,737	18,059	29.8%
	Retail service	4,053	5,094	8.4%
	Retail subtotal	**29,852**	**37,515**	**62.0%**
Services	Food & Beverage	7,234	9,091	15.0%
	Leisure service	7,234	9,091	15.0%
	Financial & professional service	3,828	4,811	8.0%
	Services subtotal	**18,296**	**22,992**	**38.0%**
	Total gross sqm	**48,149**	**60,507**	**100%**

requirement of 18,296 and 22,992 gross sqm for food and beverages, leisure services and financial/professional service uses.

Overall, in terms of both retail use and service use, Table 7 shows a minimum of 48,149 gross sqm and a maximum of 60,507 gross sqm capacity. This figure relates to the Town Centre only and does not apply to the 3 village centres (Tully, Lehaunstown and Priorsland) earmarked for the wider Cherrywood area. In the Planning Scheme they accounted for approximately an additional 10% of overall floorspace requirements.

9.0 Capacity findings relative Cherrywood Planning Scheme

The minimum and maximum gross floorspace capacity figures for both retail and service use floorspace are considered against the Planning Scheme in Table 8. In terms of retail floorspace Table 6.2.1 of the Planning Scheme estimated a minimum requirement of 34,394 gross sqm and a maximum requirement of 40,909 gross sqm. The minimum and maximum retail floorspace capacity outlined in this report is estimated at between 29,852 gross sqm and 37,515 gross sqm.

Table 8

Retail and Service Use Capacity Findings in relation to the Planning Scheme						
	Retail gross sqm*		**Service use gross sqm #**		**Total**	
	Min	**Max**	**Min**	**Max**	**Min**	**Max**
Projected capacity	29,852	37,515	18,296	22,992	48,149	60,507
Planning Scheme original @ 66:100 net to gross (TC1-TC4)	34,394	40,909	47,500	60,000	81,894	100,909

** Planning Scheme retail floorspace figures include Convenience goods, Comparison goods and Retail Services floorspace in Table 6.2.1 of the Scheme*
 # Service Uses are included within the Non-Retail Uses figures in Table 6.2.1 of the Planning Scheme

Similarly, the level of service use floorspace projected in this capacity assessment is lower than the non-retail floorspace figure stated in the Planning Scheme. There are a number of critical factors that need to be borne in mind when considering these differences, which are outlined below.

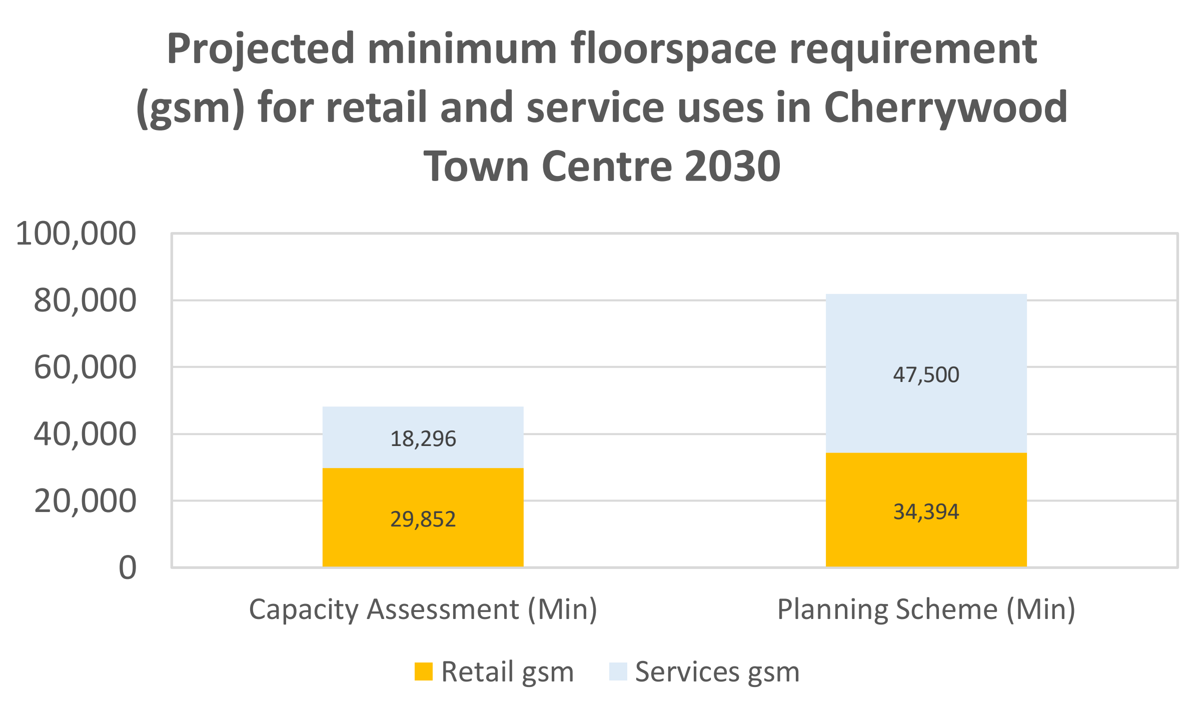
- The disparity between the floorspace forecasts can partly be accounted for by the difference in classifying uses. The Planning Scheme's non-retail floorspace category makes an allowance for uses other than service uses. These include floorspace assigned to educational and community use, together with health, public/institutional uses and hotel space. As stated throughout this report, their floorspace requirements are governed by the organisational needs of the respective bodies involved. They cannot be quantified based on expenditure levels or comparative analysis with GOAD data for other centres.

- In respect of retailing, the Planning Scheme adopted a net to gross floorspace ratio of 66:100 when converting its net retail floorspace calculations to gross floorspace figures. This was based on the Retail Planning Strategy for the Greater Dublin Area (GDA) at the time. Modern fit-outs point to a net to gross floorspace ratio of 75:100. Gross retail floorspace in Tables 6.2.1 and Table 6.2.2. of the Planning Scheme would need to be adjusted downwards to reflect these modern trends.

- Also, given the passage of time, the capacity assessment factored in a higher impact from online retail sales, which translates into a reduced need for floorspace on the ground. This is particularly the case with comparison goods shopping.

The above findings are graphically illustrated in Figure 7. It compares the minimum floorspace estimates identified in this Capacity Assessment with those for the Planning Scheme.

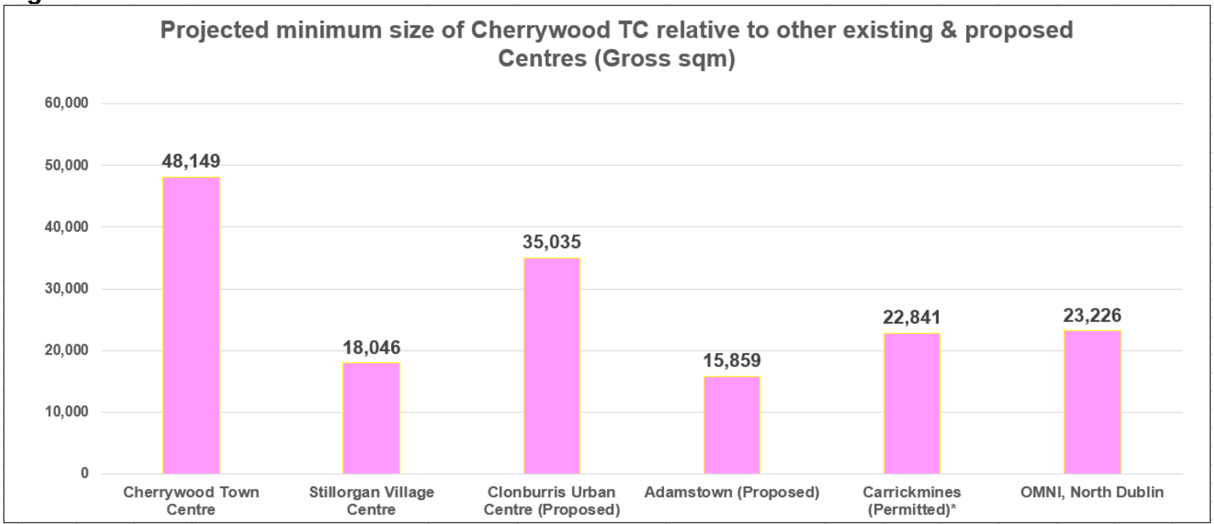
Figure 7



10.0 Comparative analysis with other Centres

A useful frame of reference for assessing the appropriate scale of retail and service use floorspace for Cherrywood Town/District Centre is the size of other existing and proposed Centres in Dublin. Many District Centres are essentially purpose-built shopping centres. Figure 8 indicates that the minimum level of retail and service use floorspace provision projected for Cherrywood Town Centre (48,149 gross sqm) exceeds that forecasted for Clonburris Urban Centre (35,035 gross sqm).

Figure 8



** Figure for Carrickmines excludes existing retail warehousing floorspace (c.31,000 sqm)*

11.0 Research difficulties and deficiencies

Research of this nature is particularly vulnerable to a lack of consistency in classifying retail and non-retail uses. The lack of standardisation in the categorization of uses undermines the scope for reliable comparative analysis with other centres.

In respect of retail uses, inconsistency in classification has implications for expenditure projections. Most notably, expenditure on service uses is often grouped under comparison goods shopping. This can lead to inflated expenditure per head estimates for comparison goods shopping which can grossly distort floorspace projections.

12.0 Conclusion

The main findings of this capacity assessment can be distilled as follows:

- The combined floorspace requirement for retail and service uses in Cherrywood Town Centre is estimated to range from 48,149 gross sqm to 60,507 gross sqm. This is lower than the Planning Scheme range of 81,894-100,909 gross sqm. This difference is attributed to a number of factors, including:
    - the floorspace allowance in the Planning Scheme for other uses other than retail and service uses, such as a library, primary care centre, etc.
    - a more focussed assessment in the capacity report of the contribution of non-resident employee expenditure in sustaining retail floorspace;
    - the adoption of a modern net to gross ratio in the capacity report (75:100), as opposed to 66:100 in the Planning Scheme, when converting net floorspace calculations to gross floorspace; and
    - the increasing role of online retail sales, post-covid, especially for comparison goods shopping.

- Based upon the convenience goods floorspace capacity projection of 12,062-14,632 gross sqm, Cherrywood Town Centre could, in theory, accommodate two food superstores with a maximum net floorspace of 4,000 net sqm (as per the cap in the retail planning guidelines). It also has appreciable scope to accommodate a range of comparison goods retailers selling durable items, including clothes, footwear, leisure goods and household items.

While it is acknowledged that the projection of floorspace requirements is not an exact science and is subject to the vagaries of economic and societal change, the findings of this assessment should still be viewed as broad guidance for the development of retail and service uses at Cherrywood.

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