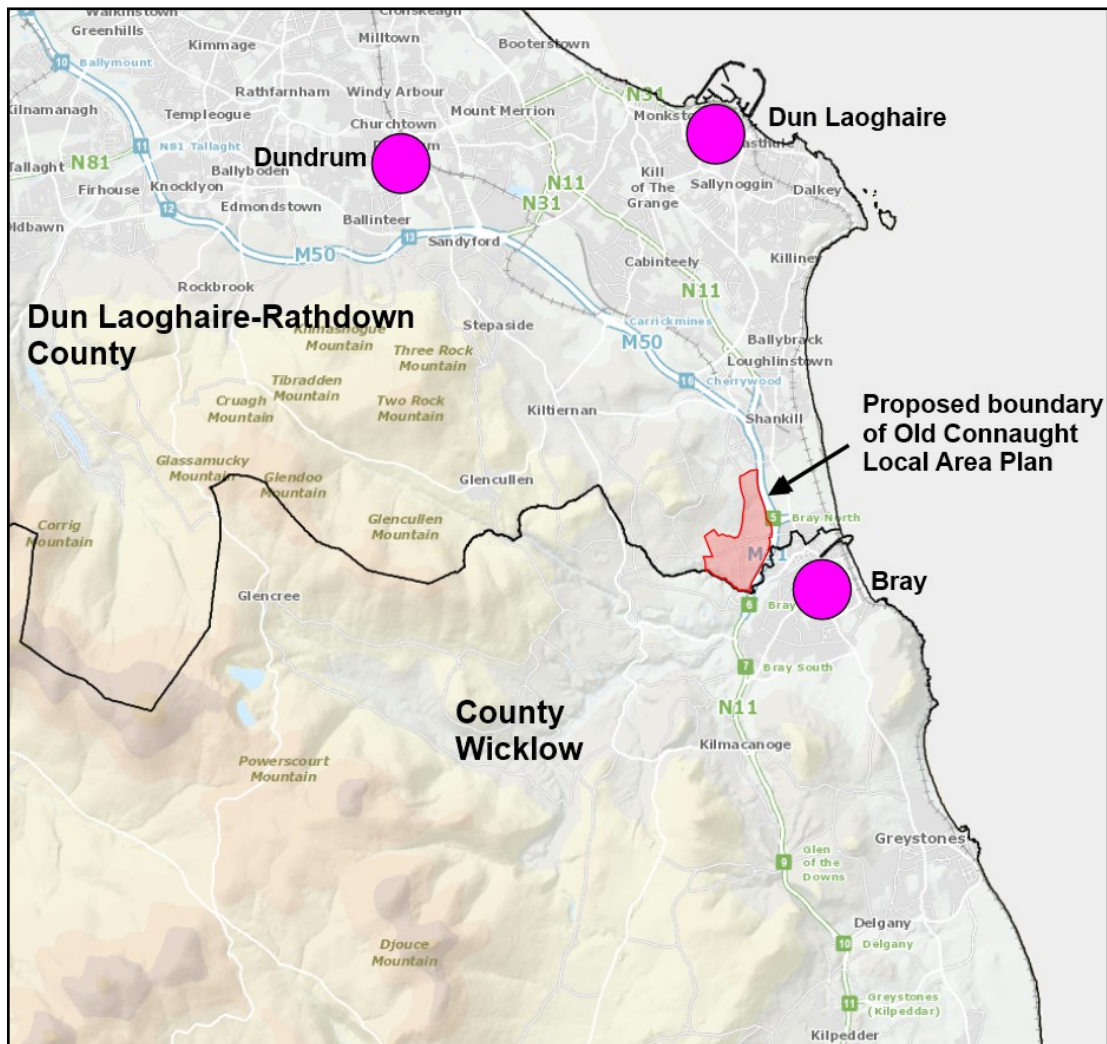


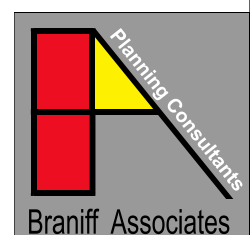
Floorspace Capacity Assessment for Retail and Service Uses in Old Connaught, Dùn Laoghaire-Rathdown



Prepared on behalf of
Dùn Laoghaire-Rathdown County Council

JAN 2025 (FINAL)

Braniff Associates
Chartered planning consultants
5 Windsor Avenue North
Belfast BT9 6EL
Tel 0044 2890662050
Email: info@braniffassociates.com



Contents

	Page Number
1.0 Introduction	1
2.0 Scope of Report	1
3.0 The approach to assessment	2
4.0 Existing Retail and Services Context	3
5.0 Planning and Retail Context	5-12
6.0 Economic Outlook	12
7.0 Capacity assessment for retail floorspace	13-17
8.0 Capacity assessment for services floorspace	18-19
9.0 Minimum and Maximum Floorspace Capacity for Retail and Service Uses	19-20
10.0 Latest retail trends	21
11. Overall floorspace capacity & Potential Uses	21-22
12. Conclusion	22-23
 Appendices	
Appendix 1 : Detailed retail calculations for Table 5 in Assessment Report (A1 Zoned Land + SLR land)	
Appendix 2 : Detailed workings of Maximum floorspace capacity for A1 Zoned Land and SLR Land	

1.0 Introduction

This report assesses the capacity for retail and service use development at Old Connaught, with a view to informing plan and policy making for the Old Connaught Local Area Plan. It is prepared by Braniff Associates on behalf of Dún Laoghaire-Rathdown County Council in order to provide an independent, evidence-based understanding of the potential of the area for such uses.

2.0 Scope of Report

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

The retail and service uses that are the subject of projections in this Assessment are described in subsections 2.1 and 2.2 below.

2.1 Retail uses

Retail uses are commonly defined as convenience goods and comparison goods.

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.

2.2 Service uses

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

Retail services

Retail services are businesses which focus on selling a service rather than selling goods. This category includes hairdressing and personal care outlets, dry cleaners, travel agents, repair shops, post offices, opticians, tattooists and clothes hire shops.

Food & beverage services

Food & beverage services cater for the needs of people in terms of eating and drinking out (mainly non-alcohol) and include restaurants, cafes, coffee shops and hot food outlets.

Leisure services

Leisure service uses refer to outlets that cater for the needs of people in terms of socialising, entertainment and recreation. It includes the following: public houses/bars/clubs; betting offices, gaming centres, bingo establishments; places of entertainment such as cinemas; and places of recreation such as gyms (including those available to the public in hotels) and leisure centres.

Financial and professional services

Financial and professional services include 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 interact with the public via own-door 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.

3.0 The approach to assessment

The capacity to develop retail and service uses in Old Connaught is assessed 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: population growth; retail expenditure by resident shoppers; 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 include the following Central Statistics Office (CSO) publications: the National Income and Expenditure Report 2020, Household Budget Survey 2016, Population and Labour Force Projections 2023-2057, Annual National Accounts 2023 and Central Bank Quarterly Bulletins for 2024.
- UK figures in instances where Irish ones are lacking, namely on retail turnover, online shopping and floorspace mix in centres. Sources include Experian's Retail Planner Briefing Note 21, Feb 2024 relating to turnover and online shopping, as well as GOAD's Retail Centre Report 2022 on floorspace mix. UK Turnover figures are converted to Irish figures by factoring in the differentials in currency and the cost of living.

2nd Step – Calculate Services Floorspace requirement

Building upon the projected retail floorspace figures calculated above the proportional floorspace breakdown of service uses can then be estimated on a pro rata basis, based on the percentage mix of retail and service uses typically found in the centre of settlements.

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

4.0 Existing Retail and Services Context

At present, there is limited existing retail and service use provision within the Old Connaught area. At Festina Lente there is a garden shop and dog grooming business.

Old Connaught is located next to Bray Town and is approximately 2kms from its Main Street (Figure 1). Bray Town performs a high level retail and service function with its convenience, comparison and service uses serving a wide catchment including the Old Connaught area. The proximity and function of Bray are key determinants in assessing the appropriate scale of retail and service uses at Old Connaught.

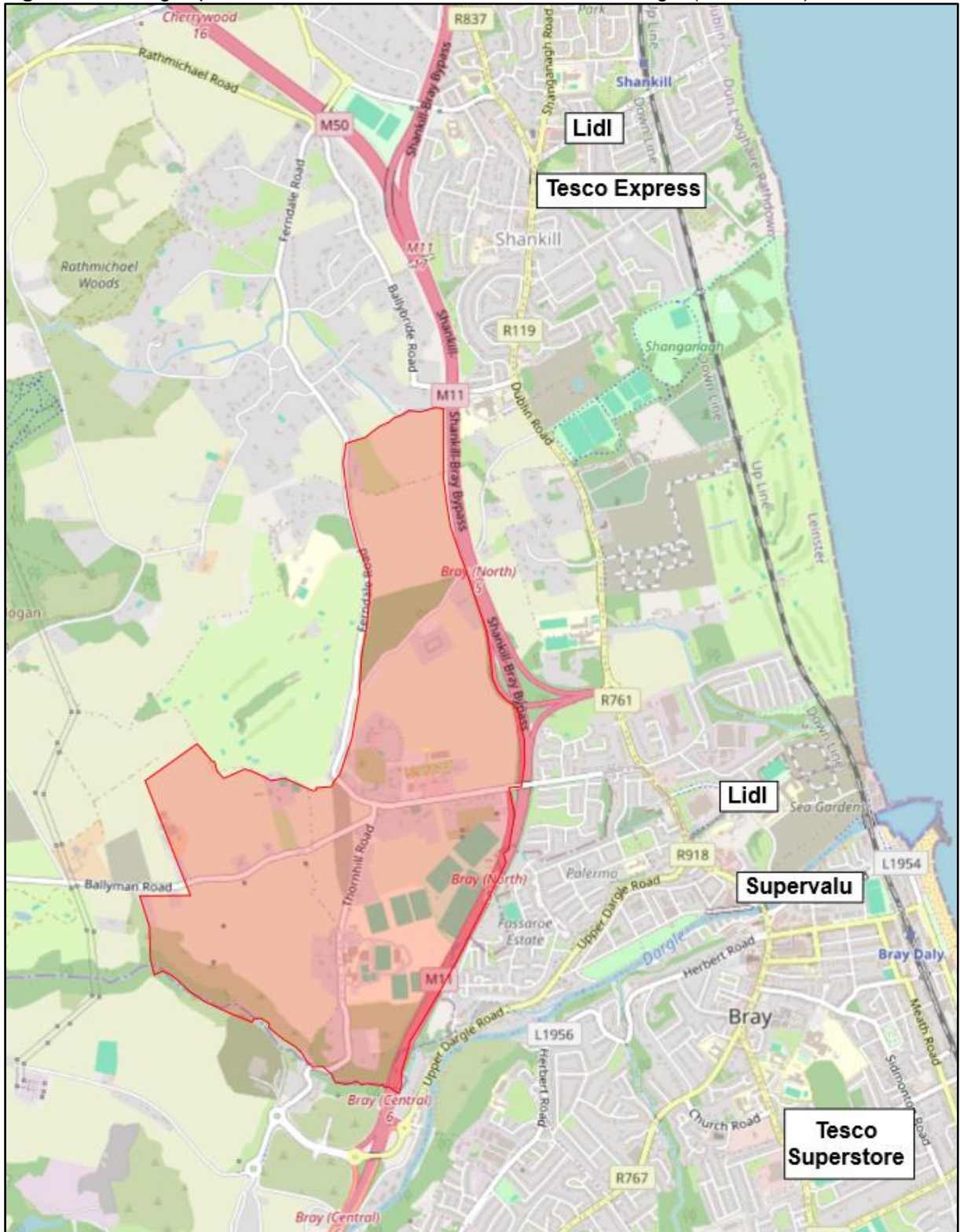
Figure 1 overleaf indicates that there are a number of supermarkets within several kms of Old Connaught. A Lidl supermarket is located approximately 1km from Old Connaught at Dublin Road, Bray. A Supervalu supermarket is located approximately 1.4km from Old Connaught at the Castle Street Shopping Centre, Bray while a Tesco superstore is located roughly 2.7km from Old Connaught at Vevay Road in Bray.

Smaller scale centres in the vicinity of Old Connaught include the Barbeque Centre and Raven Hall on Dublin Road. A number of additional local retail and service uses are located along Dublin Road entering Bray.

To the north-east of Old Connaught at Shankill there is another Lidl supermarket, as well as a Tesco Express. In addition, Shankill Village accommodates a mix of neighbourhood scale convenience outlets and retail services.

The Woodbrook-Shanganagh Local Area Plan, located to the east of Old Connaught, includes provision for convenience retail and small-scale retail services to cater for the daily needs of local residents.

Figure 1: Existing supermarkets and service centres near Old Connaught (shaded red)



5.0 Planning and Retail Context

5.1 Eastern & Midland Regional Assembly Regional Spatial & Economic Strategy 2019-2031

Within the County of Dún Laoghaire-Rathdown, Old Connaught is an area which is designated as a New Residential Community in the Metropolitan Area Strategic Plan (MASP) of the Regional Spatial & Economic Strategy (RSES) for the Eastern and Midland Regional Assembly 2019-2031. Its location close to Bray also means that the area is spatially considered a part of Bray and the RSES therefore acknowledges Old Connaught as a growth area for this settlement.

“In order for Bray to fulfil its growth potential, lands at Fassaroe to the west of the N/M11 are targeted for new housing, employment and major community and sports facilities, along with development of lands at Old Connaught (Conna)-Fassaroe, which are within Dún Laoghaire-Rathdown.”¹

The RSES states that the retail sector is a significant employer and economic contributor in the Region. It also plays a key role in placemaking and creating attractive liveable environments. As a significant attractor it enables the provision of strong mixed-use commercial cores within the network of city, towns and villages in the Region and can equally perform a key role in the regeneration of areas.

The retail hierarchy for the Region, as included in the RSES, is tabulated in Figure 2. Within Dún Laoghaire-Rathdown, both Dún Laoghaire and Dundrum are identified as Major Town Centres. Of particular relevance to Old Connaught is Bray, which is also identified in the regional retail hierarchy as a Major Town Centre.

¹ p77, Eastern & Midland Regional Assembly Regional Spatial & Economic Strategy, 2019-2031

Figure 2: Regional Retail Hierarchy

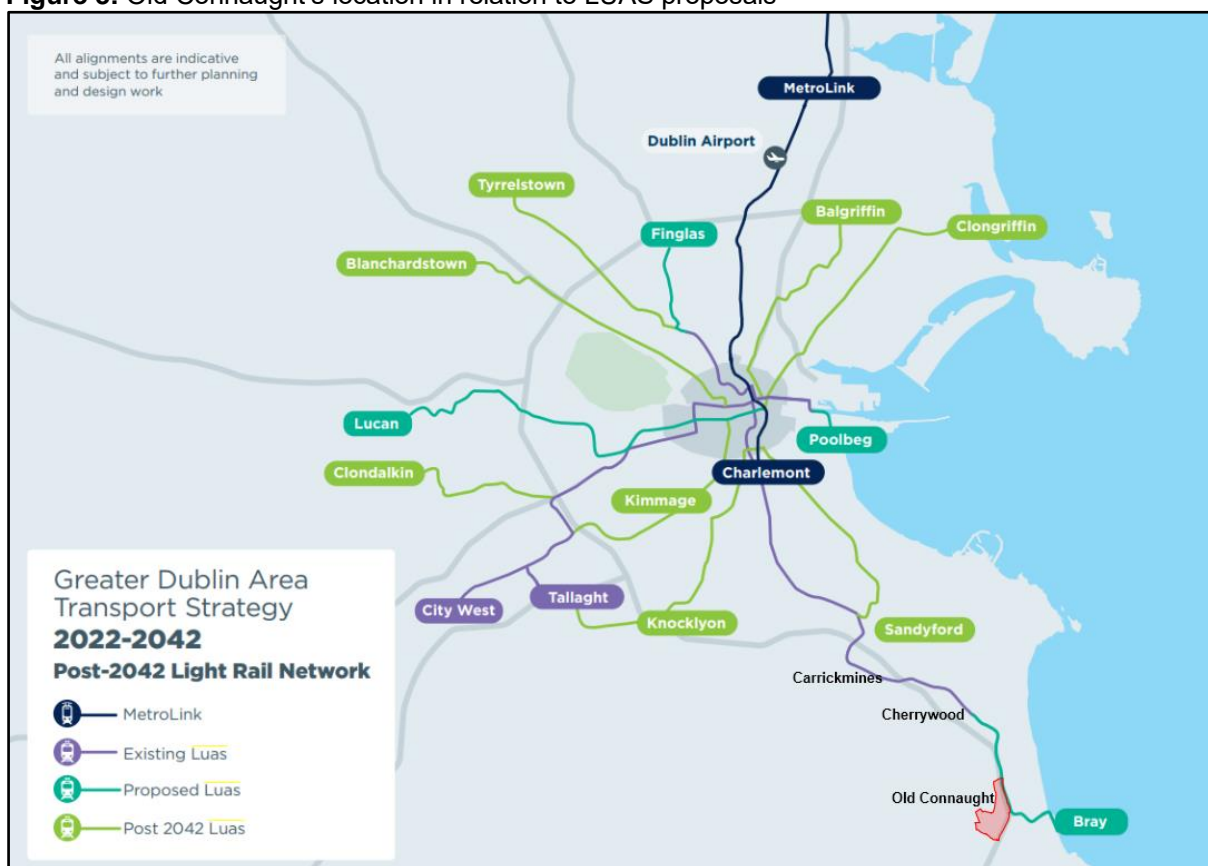
Level 1	Metropolitan Centre	Level 3	Town And/Or District Centres & Sub-County Town Centres (Key Service Centres)
	Dublin City Centre		Dublin City: Finglas, Northside Shopping Centre, Ballyfermot, Rathmines, Crumlin Shopping Centre, Donaghmede Shopping Centre, Omni, Ballymun, Point Village and Poolbeg, Clongriffin / Belmayne, Phibsborough, Naas Road
Level 2	Major Town Centres & County (Principal) Town Centres		Fingal: Malahide, Balbriggan, Skerries, Charlestown
	Dún Laoghaire: Dún Laoghaire, Dundrum		South Dublin: Adamstown, Crumlin (Ashleaf), Clonburris, Clondalkin, Citywest, Kilnamanagh, Lucan, Rathfarnham
	Fingal: Swords, Blanchardstown		Dún Laoghaire-Rathdown: Stillorgan, Blackrock, Cornelscourt, Nutgrove, Cherrywood
	Kildare: Naas /Newbridge, Maynooth		Wicklow: Greystones, Arklow, Blessington (Baltinglass, Rathdrum, Newtownmountkenedy)
	Laois: Portlaoise		Meath: Ashbourne, Dunshaughlin, Kells, Trim (Laytown/Bettystown)
	Longford: Longford		Kildare: Celbridge, Kilcock, Kilcullen, Athy, Kildare, Monasterevin, Clane, Leixlip
	Louth: Drogheda, Dundalk		Laois: Portarlington, Graiguecullen
	Meath: Navan		Louth: Ardee, Drogheda District Centre: Matthews' Lane, Dundalk District Centres: Dublin Road & Ard Easmuinn
	Offaly: Tullamore		Offaly: Birr, Edenderry
	South Dublin: Tallaght, Liffey Valley		Westmeath: Castlepollard
	Westmeath: Athlone, Mullingar		Longford: Granard
	Wicklow: Bray, Wicklow	Level 4	Neighbourhood Centres, Local Centres-Small Towns And Villages
		Level 5	Corner Shops/Small Villages

Source: Table 6.1, p137, EMRA RSES.

5.2 Transport Strategy for the Greater Dublin Area 2022-2042

Measure LRT5 of the Greater Dublin Area Transport Strategy 2022-2042 states that it intends to extend the Luas Green Line southwards in order to serve the Bray and Environs area. For the purposes of this floorspace assessment it is assumed that, in the long term (post 2042), Old Connaught will be served by, or will be in close proximity to, the extension of the Luas Green Line (Figure 3). The extension of the Luas will provide Old Connaught with a frequent public transport service to higher order retail centres such as Dublin City Centre, Bray, Cherrywood, Dundrum, etc.

Figure 3: Old Connaught's location in relation to LUAS proposals



Source: Figure 12.7: Post-2042 Light Rail Network, National Transport Authority Greater Dublin Area Transport Strategy 2022-2042

5.3 Dun Laoghaire Rathdown County Development Plan 2022-2028

In keeping with the RSES, Old Connaught is similarly designated as a New Residential Community in the Core Strategy of the Dun Laoghaire Rathdown County Development Plan 2022-2028 (DLR CDP) - Figure 4.

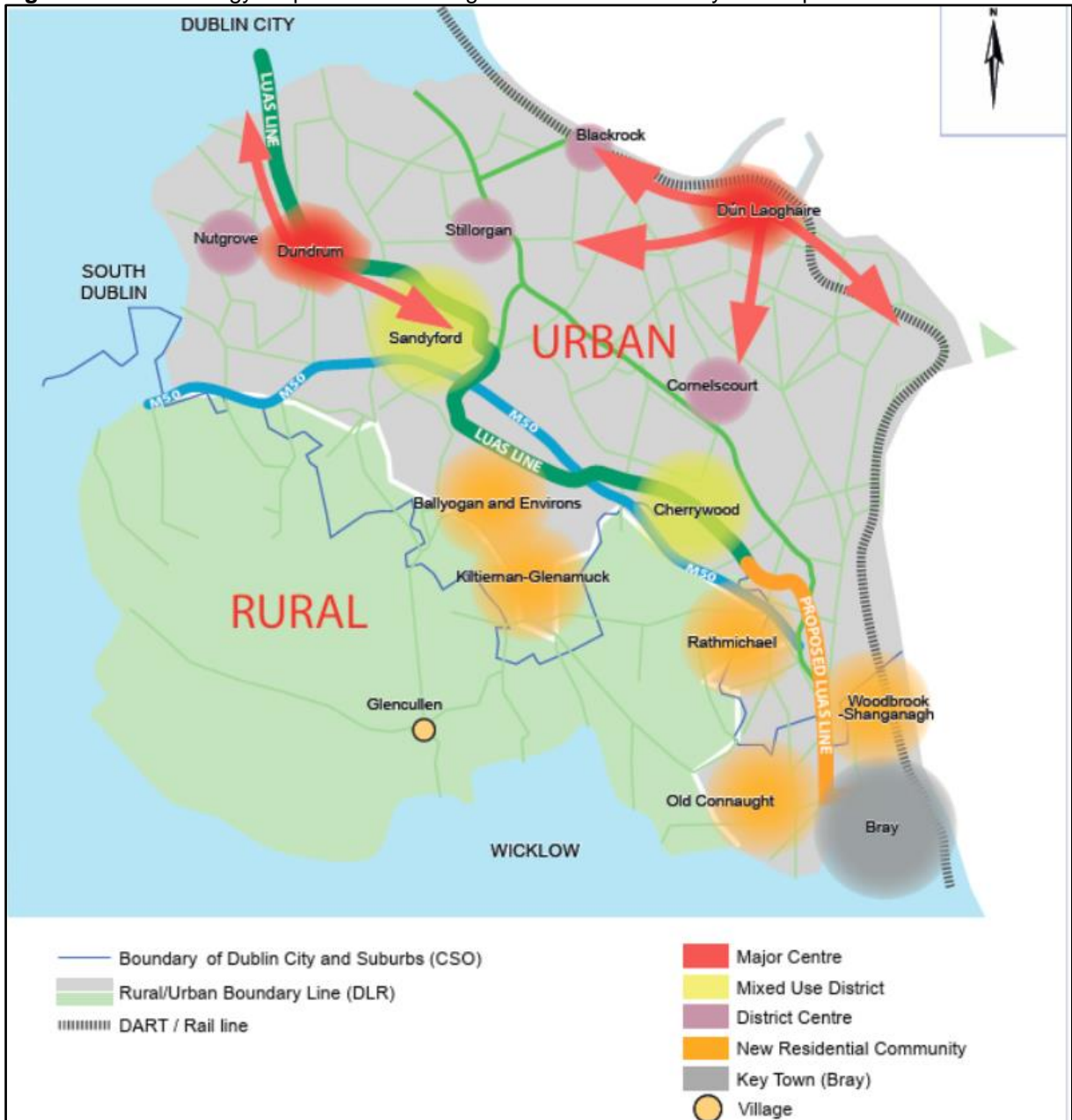
Policy Objective PHP4: Villages and Neighbourhoods of the DLR CDP is particularly relevant to the development of Old Connaught as a New Residential Community under the Core Strategy. It seeks to implement a strategy for residential development based on a concept of sustainable urban villages and to promote and facilitate the provision of '10-minute' neighbourhoods.

The sustainable urban village concept is based on the premise that people should be able to access most of their daily living requirements within easy reach, preferably within a short walk or cycle timeframe of their homes. This concept focuses on reducing the need to travel by private car and is central to the principle of sustainable development.

The '10-minute' neighbourhood concept incorporates the principles of a sustainable urban village in terms of being able to walk or cycle to neighbourhood support facilities within a 10-minute timeframe. It is recognised however that not every house will have access to all such facilities located within this

timeframe. In this regard the 10-minute neighbourhood includes access to high quality public transport within a short walk from homes which in turn can provide sustainable access to neighbourhood support facilities and employment opportunities.

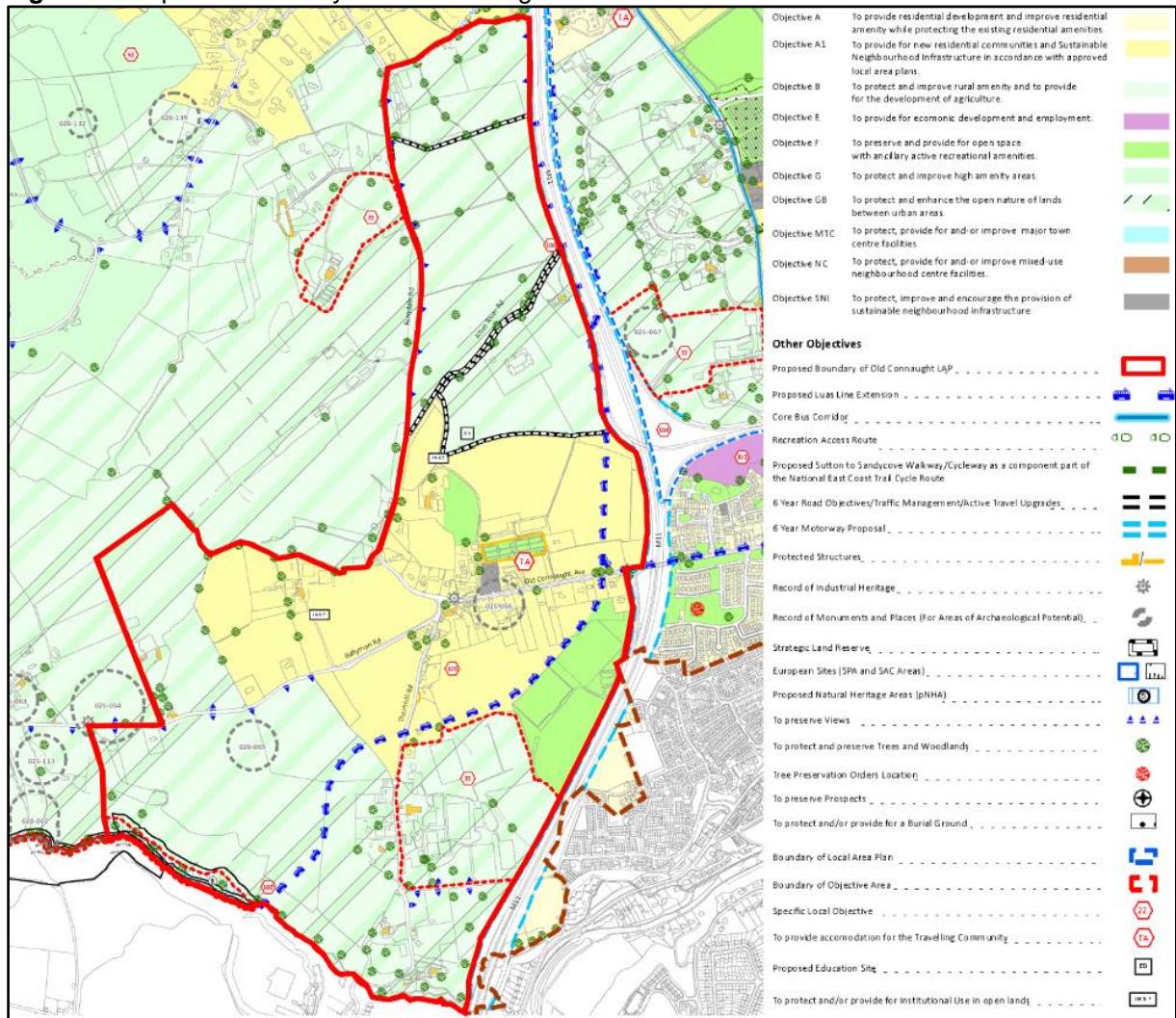
Figure 4: Core Strategy Map in the Dun Laoghaire Rathdown County Development Plan 2022-2028



Source: Figure 2.9, Dún Laoghaire-Rathdown County Development Plan 2022-2028

The development lands at Old Connaught are zoned *Objective A1 - To provide for new residential communities and Sustainable Neighbourhood Infrastructure in accordance with approved local area plans* (Figure 5). To this end, Dún Laoghaire-Rathdown County Council is in the process of preparing a Draft Local Area Plan for the Old Connaught area.

Figure 5: Proposed boundary of Old Connaught Local Area Plan



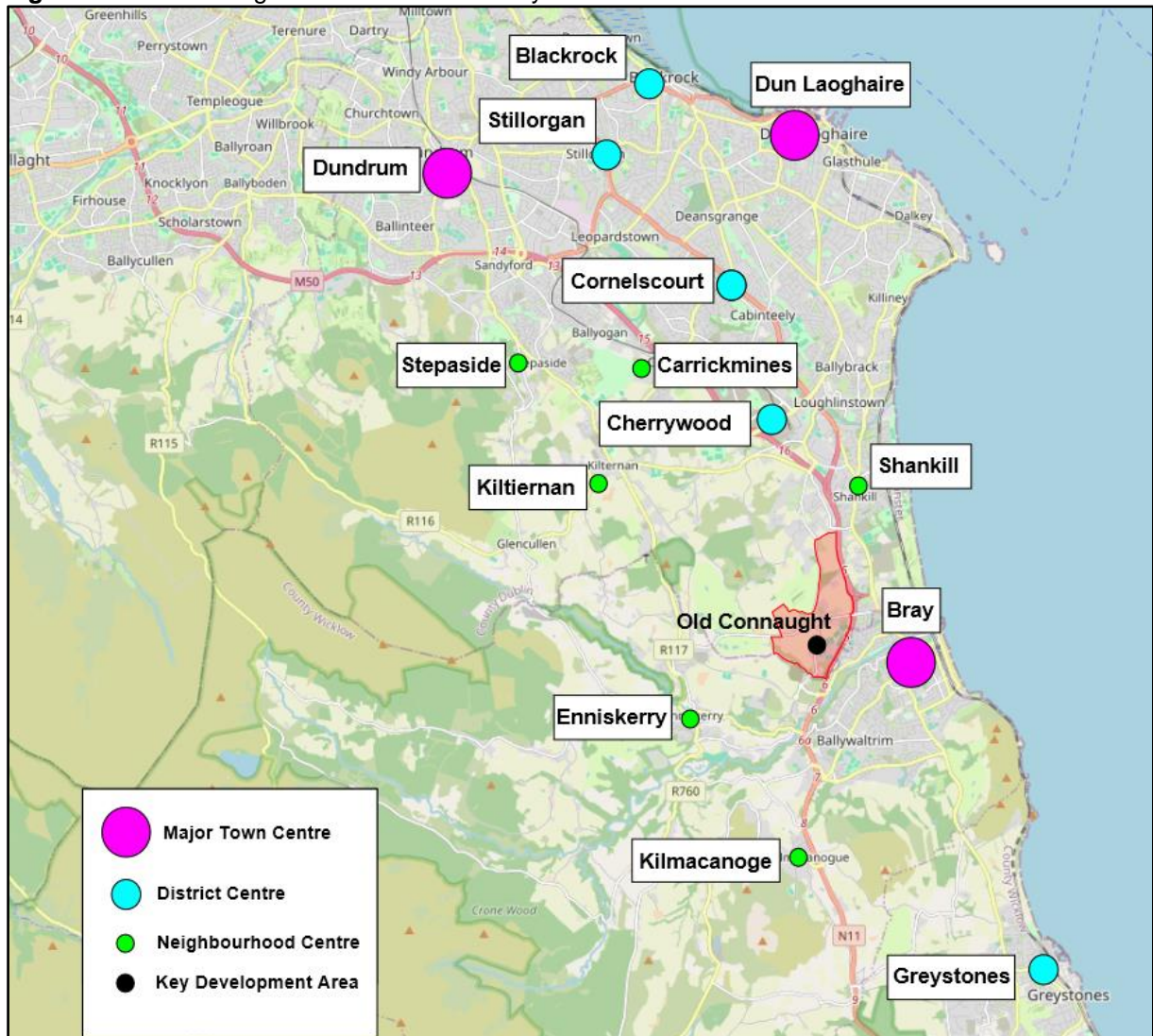
Source: Dún Laoghaire-Rathdown County Development Plan 2022-2028

Having regard to the provisions of the Dún Laoghaire-Rathdown County Development Plan 2022-2028, this Report considers the appropriate retail and service floorspace provision for Old Connaught having regard to, inter alia, planned population levels and the future role/function of Old Connaught within the retail hierarchy for the County.

Dún Laoghaire and Dundrum are designated Major Town Centres in the county retail hierarchy (Figure 6). Nearby Cherrywood, as well as Cornelscourt, Stillorgan, Blackrock and Nutgrove are all designated District Centres in the hierarchy. The nearest existing Neighbourhood Centre to Old Connaught is located 3kms to the north east at Shankill Village. The planned Neighbourhood Centre at Kiltiernan is located to the north west.

Bray is designated a Major Town Centre in the Wicklow County Development Plan 2022-2028, while Enniskerry and Kilmacanoge are designated Neighbourhood Centres.

Figure 6: Old Connaught in the Retail Hierarchy



Note: This Figure illustrates a sub-set of retail centres which form part of the retail hierarchies for Dún Laoghaire-Rathdown County Council and Wicklow County Council.

The DLR CDP also refers to lands designated as Strategic Land Reserve (SLR) at Old Connaught.

“The lands identified as a strategic land reserve are located to the north of Old Connaught in zoned greenbelt land. The lands comprise c. 38 hectares and include significant provision for educational, open space and recreational facilities. Part of the lands comprise existing residential development which is subsumed into the overall strategic land reserve.”²

Policy Objective CS5 of the DLR CDP states that it is policy *“To protect the strategic land reserve for potential future residential growth and to restrict development except for minor modifications and extensions to existing properties and the development of appropriate educational/open space/recreational facilities compatible with the underlying zoning objective and in line with any future Old Connaught LAP.”³*

² S 2.4.5, p36, Dún Laoghaire-Rathdown County Development Plan 2022-2028

³ p37, Dún Laoghaire-Rathdown County Development Plan 2022-2028

The potential population to be housed on SLR land and the expenditure generated is also considered as part of this capacity assessment.

The Dún Laoghaire-Rathdown County Development Plan 2022-2028 recognises that the vitality of centres is linked to their wider multi-functional role and is not solely dependent on retailing. Some of the objectives of the DLR CDP have a relevance for catchment estimation and these are referred to later in Section 7.0 of this report.

5.4 Wicklow County Development Plan 2022-2028

Old Connaught is located in immediate proximity to the settlement boundary of Bray, and is situated less than 2kms from Bray Main Street.

The retail hierarchy, included in the Wicklow County Development Plan 2022-2028, identifies Bray as a Major Town Centre and County Town. The strategy for Bray, as set out in the Wicklow County Development Plan, includes the following:

"Bray should provide for a high level retail function serving a wide catchment. It is therefore envisaged that Bray will provide a full range of all types of retail from newsagents to specialist shops and boutiques, large department stores, foodstores of all types, shopping centres and high levels of mixed uses including the arts and culture to create a vibrant living place. The town will be a focus for medium and higher quality comparison goods.

The centre should be well connected and served by high quality public transport. Bray should provide for the 'big shop' convenience needs of its residents and other settlements in the vicinity including Enniskerry, Kilmacanogue and Shankill. The centre has the opportunity to provide for the comparison shopping needs of a much wider catchment beyond its more immediate environs, particularly extending south and north to other settlements along the N11. Residents and visitors should have access to a range of quality leisure and cultural activities."

Having regard to the proximity and function of the Major Town of Bray, it is recommended that the development of Old Connaught is supported by appropriately scaled retail provision, which provides for the immediate needs of its residents, but does not undermine the role of Bray Town as the principal retail and service destination serving the area.

5.5 Old Connaught Draft Local Area Plan, Pre-Draft Consultation Issues Paper, May 2023

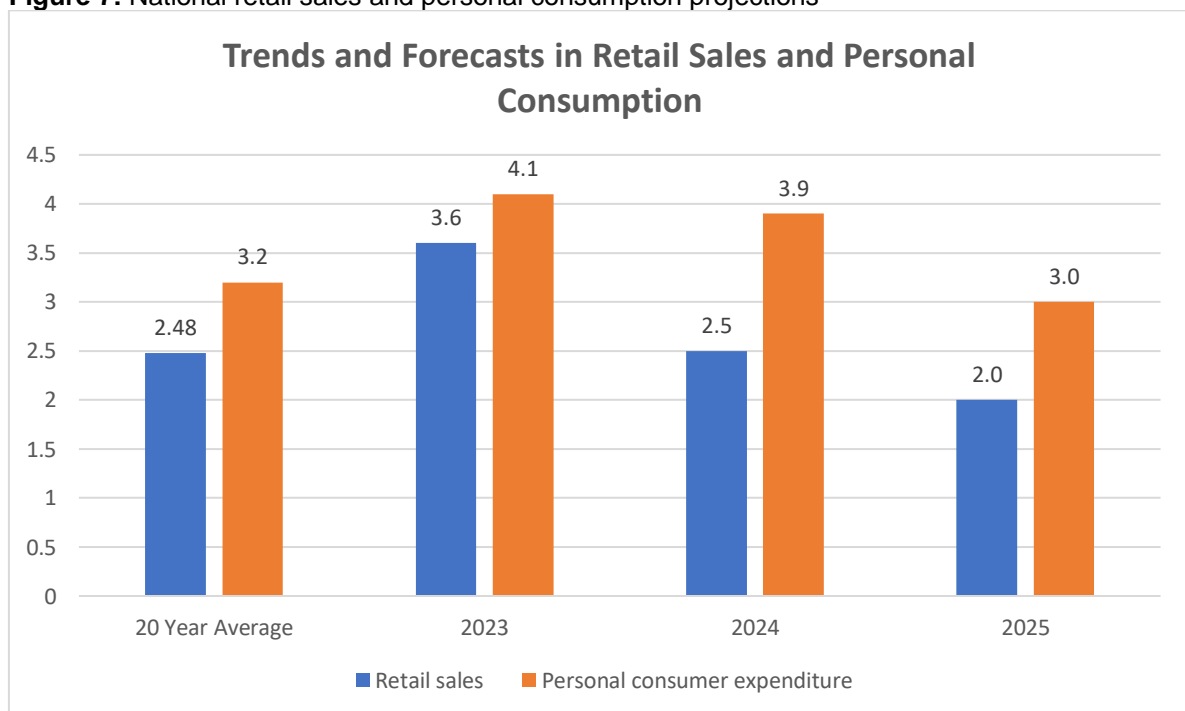
Local shops and services are recognised as important local facilities in the Issues Paper for the preparation of the Local Area Plan for Old Connaught.⁴ The Paper also acknowledges the proximity of facilities nearby in Bray Town Centre and the established community of Shankill.

6.0 Economic Outlook

The Covid pandemic 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 7 has been formulated from a number of economic sources including from the Central Bank Quarterly Bulletin, Sep 2024, in respect of information on personal consumer expenditure and from Trading Economics for retail sales forecasts. This information was then benchmarked against data in 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 8 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 7: National retail sales and personal consumption projections



⁴ p17, Old Connaught Draft Local Area Plan Pre - Draft Consultation Issues Paper May 2023

7.0 Capacity assessment for retail floorspace

The ensuing analysis is based on the understanding that the development of Old Connaught will be guided by a number of objectives in the Dún Laoghaire-Rathdown County Development Plan 2022-2028 (DLR CDP). These include Policy Objective MFC1 on Multifunctional Centres where *“it is a Policy Objective of the Council to embrace and support the development of the County’s Major Town Centres, District Centres and Neighbourhood Centres as multifunctional centres which provide a variety of uses that meet the needs of the community they serve.”*

It also includes Policy Objectives PHP4 which seek to *“Implement a strategy for residential development based on a concept of sustainable urban villages”* and to *“Promote and facilitate the provision of ‘10-minute’ neighbourhoods.”*

In addition, reference can be made to Policy Objective RET7 in the DLR CDP which relates to Neighbourhood Centres. It states that *“it is a Policy Objective of the Council to support the development of the Neighbourhood Centres as the focal point of the communities and neighbourhoods they serve, by way of the provision of an appropriate mix, range and type of uses – including retail and retail services – in areas zoned objective ‘NC’ subject to the protection of the residential amenities of the surrounding area.”*

7.1 The catchment population

For the purposes of assessing future retail and non-retail floorspace requirements the potential of two catchments is considered, namely:

- A catchment comprising existing residents and future residents of A1 zoned lands. This amounts to a population of c.6,800 persons, which is inclusive of c.450 existing residents.
- A catchment comprising the above, as well as future residents living in lands identified as Strategic Land Reserve (SLR). This amounts to a potential population of c.9,600 persons, which is inclusive of the c.6,800 population above, together with capacity for an additional c.2,800 persons on lands identified as SLR.

Both of the above catchment scenarios relate to designated land identified within the boundary of the Old Connaught LAP. Population is estimated on the assumption of an average household size of 2.7 applied to existing occupied dwellings (168), and a household size of 2.7 applied to proposed A1 dwellings (c.2,350) and potential SLR dwellings (c.1,050) for the year 2034.

7.2 Retail expenditure

Information at the national level exists for various categories of consumer expenditure, though there is no standard breakdown for expenditure on convenience goods and comparison goods.

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

7.21 Expenditure on Convenience goods (Base year)

One of the most reliable sources of consumer expenditure in the Republic of Ireland 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 equates to €47 per week. Figures extrapolated from the Retail Strategy for the Greater Dublin Area (GDA) point to a similar annual expenditure on convenience goods in 2016 of €2,463. Accordingly, the HBS figure will be used as the base value for expenditure projections to the target year of 2034.

7.22 Expenditure on Comparison goods (Base year)

The level of expenditure on comparison goods is 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). However, this difference can be explained by the fact that the HBS figure in this assessment has been stripped down to exclude expenditure on service uses, the floorspace requirements for which are considered separately in this report.

7.23 Annual growth in expenditure on retail goods

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 (Table 1) indicate that during the years 2015 and 2020 real growth in expenditure on comparison goods such as clothing, footwear and household durables amounted to between 3.9% and 4.5% per annum, while expenditure on convenience goods grew by 2.5% per annum.

Table 1

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 comparison goods expenditure up to the year 2034 is projected at 4.0% per annum. However, a lower projection of 1% per annum for real growth in convenience goods is adopted to take on board up-to-date expenditure predictions outlined in the Experian Retail Planner Briefing Note 21, Feb 2024, as well as in the Central Bank Quarterly Bulletin, Sep 2024. This is more conservative than the 2.5% figure in Table 1 and is preferred for adoption in this assessment from a precautionary perspective.

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 2034. These are €2,941.33 and €3,926.03 respectively for convenience and comparison goods and these are incorporated into the analysis in Section 7.5.

7.3 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. Based on latest figures in the UK⁵ average turnover rates can be respectively estimated for the Republic of Ireland of circa €12,941 and €8,803 per net sqm, after making adjustments for currency and cost of living differentials. The latter turnover figures, aka sales densities, are more up to date and have been adopted for forecasting purposes in this report.

7.4 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. 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 correspondingly 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, whereby most online comparison goods shopping will be sourced directly from the warehouse and not existing shops.

⁵ Figures 4a and 4b, Experian's Retail Planner Briefing Note 21, Feb 2024

Viewed in the context of the above, Experian estimate that the proportion of retail sales conducted online in the year 2034 will be 7% for convenience goods and 28.8% for comparison goods.⁶

7.5 Projection of retail floorspace need

Taking into account the above considerations it is possible to estimate the capacity of Old Connaught to accommodate retail development up to the year 2034 for both convenience goods and comparison goods.

7.51 Convenience Goods

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

- The expenditure per capita figure in 2034 for convenience goods shopping will be €2941.33. This is reduced to €2,735.43 once online spend (7%) is discounted.
- The number of persons living in Old Connaught LAP, assuming the development of all A1 zoned lands, will amount to c.6,800 by the year 2034.
- Approximately 60% of convenience goods expenditure by residents, which totals €11.1m, will take place in Old Connaught. This assumption acknowledges the close proximity of a number of existing supermarkets to Old Connaught. In particular, both the Lidl and Supervalu supermarkets are located within 1.5kms of the LAP area. Equally, however, it also recognises the importance of convenience retail at the neighbourhood level in achieving the '10-minute' settlement concept and promoting sustainable movement patterns.
- When the above expenditure figure is divided by the turnover rate for convenience goods floorspace (€12,941 per net sqm) a convenience goods floorspace requirement of 862 net sqm is estimated. In gross floorspace terms this equates to 1,150 gross sqm.

7.52 Comparison goods

The same forecasting approach can equally be undertaken in Table 2 for comparison goods shopping in Old Connaught. It is important to note that this form of shopping involves comparing prices and quality of durable goods such as clothes, footwear, household items, etc. By implication, therefore, the majority of it takes place in larger centres and not small settlements like Old Connaught.

Against this background the following assumptions are made in this assessment:

- The expenditure per capita figure in 2034 for comparison goods shopping will be €3,926.03. When this figure is adjusted to omit the proportion of expenditure spent online, estimated at 28.8% in the year 2034, this figure decreases to €2,795.34.

⁶ Appendix 3, Experian's Retail Planner Briefing Note 21, Feb 2024

- It is assumed that the overriding majority of shopping for comparison goods will be undertaken outside the LAP area in the larger centres, including inter alia Bray, Cherrywood, Dundrum, Dún Laoghaire and Dublin City Centre. It is considered that the provision of comparison retail at Old Connaught, other than that which serves a need at the neighbourhood level, could undermine the role of Bray Town as the principal higher order retail and service destination serving the area. Accordingly, it is estimated that 10% of LAP expenditure on comparison goods will be retained by shops in Old Connaught (€1.9m).
- When the above expenditure figure is divided by the turnover rate for comparison goods floorspace (€8,803 per net sqm) a retail floorspace requirement of 216 net sqm is estimated. This equates to 288 gross sqm.

In total, therefore, it is estimated that there will be a retail floorspace requirement for 1,438 gross sqm in Old Connaught (1,150 convenience gsm + 288 comparison gsm) by the year 2034. Based on these retail forecasts Old Connaught could, in theory, accommodate a reasonably sized convenience store or a number of smaller local stores. A pharmacy could account for some of the comparison goods floorspace and is considered a potential appropriate use in that it would serve the local community at Old Connaught.

Table 2

Projected retail floorspace requirement for Old Connaught LAP 2034 based on development of A1 Zoned Land				
		Convenience goods	Comparison goods	
A	Expenditure per capita	€2,941.33	€3,926.03	
B	% spent online	7.0%	28.8%	
C=A-((100-B)/100)	Expenditure per capita less % spent online	€2,735.43	€2,795.34	
D	Projected resident population	6,800	6,800	
E=C*D	Total expenditure available	€18,600,950	€19,008,279	
F	Proportion of expenditure spent in LAP	60%	10%	
G=E*F	Total expenditure spent in LAP	€11,160,570	€1,900,828	
H	Turnover per net sqm	€12,941	€8,803	Total retail
I=G/H	Net retail sqm required	862	216	1,078
J=I*(100/75)	Gross sqm capacity (75% net to gross)	1,150	288	1,438

8.0 Capacity assessment for services floorspace

The capacity to develop services floorspace is estimated on the basis of the percentage mix of uses typically found in a settlement centre, as provided by Experian GOAD. Latest GOAD data for 2022 indicates that the typical percentage breakdown of floorspace in a settlement centre accords with the figures in Table 3. These percentage figures exclude other non-residential floorspace devoted to community, educational, health and public institutional uses. The figures have also been adjusted to exclude vacant floorspace.

Table 3

Percentage mix of retail & services in a typical settlement centre	
Use category	% Floorspace*
Convenience retail	18.0%
Comparison retail	35.6%
Retail subtotal	53.6%
Services #	46.4%
Total	100%
<p><i>Source: GOAD Centre Report 2022</i></p> <p><i>* Adjusted to exclude vacant floorspace</i></p> <p><i># Services floorspace comprises an aggregate of the following categories: retail services; food and beverage services; leisure services; and financial and professional services (see section 2.2 for a more detailed breakdown of these categories).</i></p>	

Armed with the floorspace figures for retailing in Table 2 and the percentage mix in Table 3, the breakdown of service use floorspace in Old Connaught can be estimated on a pro rata basis. Accordingly, Table 4 indicates a floorspace requirement of 1,246 gross sqm for service uses. It is noted that the appropriate breakdown of the aggregated floorspace figure for service uses differs depending on retail centre type. For Old Connaught, it is recommended that the breakdown of the

Table 4

Projected Floorspace Capacity for Retail and Service Uses in Old Connaught 2034			
based on development of A1 Zoned Land			
	Use category	Floorspace (gross sqm)	%
Retail	Convenience retail	1,150	18.0%
	Comparison retail	288	35.6%
Retail subtotal		1,438	53.6%
Services	Mix of Services*	1,246	46.4%
Total		2,684	100%
<p><i>* Services floorspace comprises an aggregate of the following categories: retail services; food and beverage services; leisure services; and financial and professional services (see section 2.2 for a more detailed breakdown of these categories).</i></p>			

aggregated floorspace requirement for service uses should focus primarily on provision at the neighbourhood level to serve the local population. Overall, there is an estimated capacity for 2,684 gross sqm of both retail and service use floorspace in Old Connaught by the year 2034.

The above calculations can be rerun to take on board the potential development of lands identified as Strategic Land Reserve (SLR). Their development could see the LAP catchment population increase to c.9,600 persons. The detailed workings of the retail calculations for the SLR scenario are outlined in Appendix 1 and are summarised below in Table 5. It can be seen that floorspace capacity for both retail and service uses could increase to 3,789 gross sqm based on this larger catchment.

Table 5

Projected Floorspace Capacity for Retail and Service Uses in Old Connaught 2034			
based on development of A1 Zoned Land + SLR land			
	Use category	Floorspace (gross sqm)	%
Retail	Convenience retail	1,623	18.0%
	Comparison retail	406	35.6%
Retail subtotal		2,030	53.6%
Services	Mix of Services*	1,759	46.4%
Total		3,789	100%
* Services floorspace comprises an aggregate of the following categories: retail services; food and beverage services; leisure services; and financial and professional services (see section 2.2 for a more detailed breakdown of these categories).			

9.0 Minimum and Maximum Floorspace Capacity for Retail and Service Uses

In order to incorporate an element of flexibility into the capacity projections it is recommended that the underlying assumptions relating to the retention of expenditure within the LAP catchment area are increased for convenience and comparison goods. Therefore, the retention of convenience goods expenditure within the catchment is increased from a minimum of 60%, as adopted in preceding tables, to a maximum of 65%. Likewise, retention of comparison goods expenditure is respectively increased from 10% to 15%. This adjustment allows for the distillation of a minimum and maximum floorspace range for both catchment population scenarios. In this regard, retention levels of 60% and 10% for convenience and comparison expenditure within the LAP catchment represent the minimum, while respective retention levels of 65% and 15% represent the maximum.

Within the context of the above Table 6 indicates a minimum and maximum requirement of between 2,684 gsm and 3,116 gsm of both retail and services floorspace in Old Connaught with the development of the A1 zoned lands.

Table 6

Estimated Min-Max Range of Retail and Services Floorspace Capacity in Old Connaught 2034 (A1 Zoned Lands)			
	Use category	Min gross sqm	Max gross sqm
Retail	Convenience	1,150	1,240
	Comparison	288	429
	Retail subtotal	1,438	1,669
Services	Mix of services*	1,246	1,447
Total		2,684	3,116
* Services floorspace comprises an aggregate of the following categories: retail services; food and beverage services; leisure services; and financial and professional services (see section 2.2 for a more detailed breakdown of these categories).			

The additional development of the SLR lands would increase this minimum-maximum floorspace range to between 3,789 gsm and 4,399 gsm (Table 7). The detailed workings of the maximum capacity assessment for both catchment scenarios are appended to this report as Appendix 2.

Table 7

Estimated Min-Max Range of Retail and Services Floorspace Capacity in Old Connaught 2034 (A1 Zoned Lands + SLR Lands #)			
	Use category	Min gross sqm	Max gross sqm
Retail	Convenience	1,623	1,751
	Comparison	406	605
	Subtotal	2,030	2,356
Services	Mix of services*	1,759	2,043
Total		3,789	4,399
# SLR = Strategic Land Reserve			
* Services floorspace comprises an aggregate of the following categories: retail services; food and beverage services; leisure services; and financial and professional services (see section 2.2 for a more detailed breakdown of these categories).			

10.0 Latest retail trends

In its most recent Retail Planner Brief publication Experian state that “*The pandemic brought a change in shopping habits which favoured local high streets and suburbs over the large city centres. Increased concerns about health and a shift towards working from home through a hybrid and more flexible working model also encouraged online spending and diverted footfall away from areas more reliant on public transport.*”⁷

It would appear that remote working is here to stay and with that in mind there is certainly greater potential for people to shop local. Equally, however, car borne shopping is still the most popular mode by which to shop. Hence, larger stores, which possess a greater range and choice of shopping and whose prices can benefit from improved economies of scale, will still have their appeal over Neighbourhood Centres.

The preference by retailers is to trade independently from own door, ground-floor units that are unencumbered by operational, servicing and leasing constraints associated with an enclosed centre. Therefore, while other retail and service operators would seek to locate close to a new supermarket developed in Old Connaught, in order to capitalise on its regular footfall, they would be less likely to countenance becoming part of an enclosed centre to do so.

In terms of retail layout, the most popular trend by retailers is to develop local convenience stores/supermarkets as part of a filling station development. Indeed, other uses such as hairdressers would equally find the convenience of doorstep parking on a forecourt an attraction. However, the congregation of retail and service uses around a forecourt poses urban design challenges for Old Connaught that could undermine aspirations to create a retail-anchored, focal point within the settlement – a location that equally functions as the settlement’s main civic space.

11.0 Overall Floorspace Capacity and Potential Uses

Taking into account the above analysis and having regard to the profile of similarly sized settlements, it is considered that the following retail and service uses may be appropriate to support the sustainable development of the Old Connaught area.

- In terms of convenience retail there is capacity to develop a moderately sized, self-service supermarket (c.1,000-1,500 gsm) to support the development of A1 zoned lands at Old Connaught. If the SLR lands are also developed a larger store size of c.2000 gsm may be countenanced. Alternatively, this capacity figure could take the form of a number of small convenience stores. While these may not benefit from the economy of scales derived from

⁷ p11, Experian’s Retail Planner Briefing Note 21, Feb 2024

operating from a larger footprint, a mix of operators would introduce a competitive dimension to convenience shopping provision in Old Connaught.

- Comparison retail – units of this type that may be appropriate include a pharmacy and/or a florist. Comparison goods may also comprise a proportion of the floorspace in a supermarket.
- Retail services – potential units may include personal care outlets such as a hairdresser's/beauticians and/or a post office (if not incorporated within the supermarket).
- Food and Beverage services - A café/coffee houses and/or hot food outlets.
- Leisure services – a public house and/or small gym.
- Financial & professional services – remote possibility of an auctioneer's office or a solicitor's office.

12. Conclusion

In summary, the main conclusions of this capacity assessment can be distilled as follows:

- The population and expenditure levels projected for Old Connaught are of a scale that would substantiate the development of a Neighbourhood Centre. By the year 2034, with the development of the A1 zoned land, there is potential to develop in the region of 2,684 and 3,116 gross sqm of retail and service uses in Old Connaught. The added development of the SLR land could increase this level of floorspace to between 3,789 and 4,399 gross sqm.
- Based on the findings of this capacity assessment it is recommended that a new Neighbourhood Centre is developed at Old Connaught to support planned population growth and the development of a sustainable urban village. Retail and service development at Old Connaught should be of an appropriate scale befitting a neighbourhood centre, so as not to undermine the vitality of higher tier centres in the wider area including, in particular, Bray Town Centre.
- The Neighbourhood Centre at Old Connaught should constitute a focal point for the local community and provide an appropriate mix of uses – including convenience retail, comparison retail and a range of services. Based on comparative analysis with similar locations, suitable retail and service uses could include inter alia a supermarket, café/hot food uses, hairdressers/beauticians, pharmacy and public house.

- In terms of convenience retail there is capacity to develop a moderately sized, self-service supermarket (c.1,000-1,500 gsm) to support the development of A1 zoned lands at Old Connaught. If the SLR lands are also developed, a larger store size of c.2000 gsm may be countenanced. Alternatively, this convenience retail floorspace capacity could take the form of a number of small convenience stores.

Notwithstanding the above findings, estimating floorspace need for retail and service uses is not an exact science and the statistical estimates in this assessment should not be rigidly viewed as prescriptive floorspace forecasts. Rather, the findings of this assessment should serve as broad guidance for the development of retail and service use floorspace in Old Connaught.

*Braniff Associates
Jan 2025*

APPENDICES

Appendix 1 : Detailed retail calculations for Table 5 in Assessment Report (A1 Zoned Land + SLR land)

Projected retail floorspace requirement for Old Connaught LAP 2034 based on development of A1 Zoned Land + SLR land					
		Convenience goods	Comparison goods		
A	Expenditure per capita	€2,941.33	€3,926.03		
B	% spent online	7.0%	28.8%		
C=A-((100-B)/100)	Expenditure per capita less % spent online	€2,735.43	€2,795.34		
D	Projected resident population A1 Zoned Lands + Strategic Land Reserve	9,600	9,600		
E=C*D	Total expenditure available	€26,260,164	€26,835,217		
F	Proportion of expenditure spent in LAP	60%	10%		
G=E*F	Total expenditure spent in LAP	€15,756,099	€2,683,522		
H	Turnover per net sqm	€12,941	€8,803	Total retail	
I=G/H	Net retail sqm required	1,217	305	1,522	
J=I*(100/75)	Gross sqm capacity (75% net to gross)	1,623	406	2,030	

Appendix 2

Detailed workings of Maximum floorspace capacity for A1 Zoned Land

Maximum projected retail floorspace requirement for Old Connaught LAP 2034 based on development of A1 Zoned Land				
		Convenience goods	Comparison goods	
A	Expenditure per capita	€2,941.33	€3,926.03	
B	% spent online	7.0%	28.8%	
$C=A-((100-B)/100)$	Expenditure per capita less % spent online	€2,723.67	€2,775.70	
D	Projected resident population	6,800	6,800	
$E=C*D$	Total expenditure available	€18,520,946	€18,874,793	
F	Proportion of expenditure spent in LAP	65%	15%	
$G=E*F$	Total expenditure spent in LAP	€12,038,615	€2,831,219	
H	Turnover per net sqm	€12,941	€8,803	Total retail
$I=G/H$	Net retail sqm required	930	322	1,252
$J=I*(100/75)$	Gross sqm capacity (75% net to gross)	1,240	429	1,669

Maximum projected Floorspace Capacity for Retail and Service Uses in Old Connaught LAP 2034 based on development of A1 Zoned Land			
	Use category	Floorspace (gross sqm)	%
Retail	Convenience retail	1,240	18.0%
	Comparison retail	429	35.6%
Retail subtotal		1,669	54%
Services	Mix of Services*	1,447	46%
Total		3,116	100%

* Services floorspace comprises an aggregate of the following categories: retail services; food and beverage services; leisure services; and financial and professional services (see section 2.2 for a detailed breakdown of these categories).

Detailed workings of Maximum floorspace capacity for A1 Zoned Land + SLR land

Maximum projected retail floorspace requirement for Old Connaught LAP 2034 based on development of A1 Zoned Land + SLR land				
		Convenience goods	Comparison goods	
A	Expenditure per capita	€2,941.33	€3,926.03	
B	% spent online	7.0%	28.8%	
$C=A-((100-B)/100)$	Expenditure per capita less % spent online	€2,723.67	€2,775.70	
D	Projected resident population A1 Zoned Lands + Strategic Land Reserve	9,600	9,600	
$E=C*D$	Total expenditure available	€26,147,217	€26,646,767	
F	Proportion of expenditure spent in LAP	65%	15%	
$G=E*F$	Total expenditure spent in LAP	€16,995,691	€3,997,015	
H	Turnover per net sqm	€12,941	€8,803	Total retail
$I=G/H$	Net retail sqm required	1,313	454	1,767
$J=I*(100/75)$	Gross sqm capacity (75% net to gross)	1,751	605	2,356

Maximum Projected Floorspace Capacity for Retail and Service Uses in Old Connaught 2034 based on development of A1 Zoned Land + SLR land			
	Use category	Floorspace (gross sqm)	%
Retail	Convenience retail	1,751	18.0%
	Comparison retail	605	35.6%
Retail subtotal		2,356	54%
Services	Mix of Services*	2,043	46%
Total		4,399	100%

* Services floorspace comprises an aggregate of the following categories: retail services; food and beverage services; leisure services; and financial and professional services (see section 2.2 for a detailed breakdown of these categories).