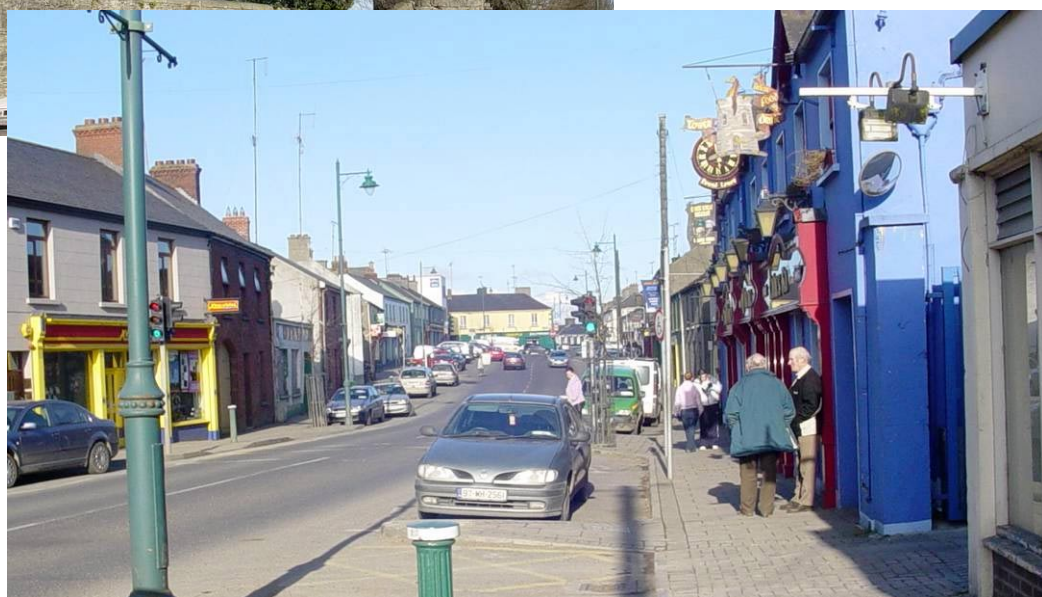
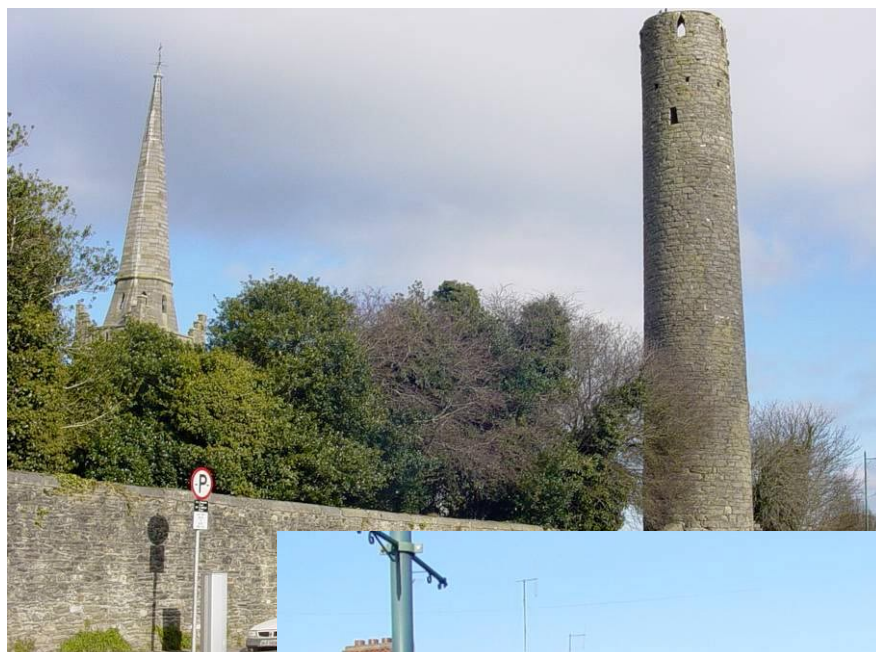




Kells Town Council



Meath County Council



Kells Retail Evaluation

March 2006

SECTION	PAGE
1 INTRODUCTION	1
2 POLICY CONTEXT	3
3 CATCHMENT AREA AND POPULATION PROJECTIONS	11
4 KELLS TOWN CENTRE HEALTH CHECK	21
5 EXPENDITURE AND TURNOVER ESTIMATES	37
6 CAPACITY ASSESSMENT	43
7 CONCLUSIONS & RECOMMENDATIONS	47

A Final Report by



Planning, Economic & Development Consultants

Ormonde House
12/13 Lower Leeson Street
Dublin 2
Tel: 01 6399360
Fax: 01 6399396

Ref: P/8428/05

1 INTRODUCTION

- 1.1 **DTZ Pieda Consulting** was appointed by Meath County Council (the Council) in February 2006 to undertake an evaluation of the retail planning policies and potential of Kells as part of the review and up date of the Kells Development Plan and to inform the preparation of the Backlands Area Local Area Plan (LAP).

STUDY OBJECTIVES

- 1.2 The objectives of the retail study were discussed and agreed at a meeting with Council Planners on 23 February 2006. With the ambition of facilitating a competitive and healthy environment for retail development in Kells, the following objectives were agreed:
- i. Examination of the boundaries of the designated Core Retail Area and Town Centre Area, as set out in the Meath County Retail Strategy, to confirm or otherwise whether these boundaries remain appropriate today given the influences of the constantly changing dynamics of the retail economy at the local, regional and national levels;
 - ii. Appraisal of any additional potential retail development locations within and around the Core Retail Area against the tests set by the 2005 Department of the Environment, Heritage and Local Government (DoEHLG) *Retail Planning Guidelines for Planning Authorities'* (RPG) Sequential Approach where the priority is town centre sites, followed by edge of centre and finally, if there are no alternatives, out of centre locations; and
 - iii. Review of our in house compendium of comparative data and information on different centres around the country to enable assessment of the relative performance of Kells against a suite of indicators such as population growth, floorspace quantum and profile and vacancies.

STUDY DELIVERABLES

- 1.3 The agreed brief for the study was that it was to be a high level piece of work which provided the following outputs:
- Review of the parts of the Meath County Retail Strategy which are specific to Kells to determine whether there requires to be a variation to the Strategy
 - Confirmation or otherwise whether the County Retail Strategy defined Core Retail Area and Town Centre Area remain appropriate
 - Provision of strategic guidance on the location and scale of any new retail development in Kells
 - A broad assessment of the expenditure capacity for additional retail floorspace in Kells and its catchment area which covers the emerging and next development plan

periods but also provides a longer term view which addresses the timescales of the National Spatial Strategy (NSS) and Regional Planning Guidelines Greater Dublin Area (RPGGDA) and Kells' role in both of these strategic planning frameworks

- Preparation of Draft Final and Final Reports.

REPORT STRUCTURE

1.4 The remainder of the report is structured as follows:

- **Section 2:** provides a review of the key new national, regional and local policies policy frameworks which have emerged since the preparation of the County Retail Strategy and that could have an influence on the retail planning and development of Kells
- **Section 3:** defines the Kells' catchment area and its population forecasts
- **Section 4:** presents our health check of Kells
- **Section 5:** sets out the expenditure and turnover estimates for the catchment area
- **Section 6:** outlines the potential for additional retail floorspace over the timescale of the emerging LAP, the next development plan and the NSS and RPGGDA
- **Section 7:** presents our conclusions and recommendations.

2 POLICY CONTEXT

- 2.1 This section distils the key policy parameters which will have an influence on the shape of retail planning and development in Kells, how this differs from the baseline that underpinned the approach adopted in the 2003 Meath County Retail Strategy (the County Retail Strategy) and whether the retail policies for the town require to be amended. The review examines, in the following sequence, the policy frameworks at the national, regional and local levels.

NATIONAL

- 2.2 The national policy frameworks of particular relevance to the future development of Kells are listed below and reviewed in the paragraphs that follow:
- i. National Spatial Strategy;
 - ii. The Retail Planning Guidelines for Planning Authorities; and
 - iii. Transport 21.

National Spatial Strategy

- 2.3 The NSS was published by the DoEHLG in late 2002 and provides the national planning framework for the delivery of more balanced social, economic and physical development between the regions to the year 2020. The 2003 County Retail Strategy did not incorporate the policies prescribed by the NSS in view of the timing of the finalisation of both strategies.
- 2.4 Of importance to this evaluation is the fact that the NSS greatly strengthens Kells' role and function within the regional and local settlement hierarchies and, hence, this requires to be reflected in the review of the retail planning and development of the town. This importance is illustrated by the following:
- In the first instance, Kells is located within the Greater Dublin Area (GDA), which is seen as essential to the performance of the national economy. The NSS requires that the '*success, competitiveness and national role*' of the GDA is built upon and sustained into the future.
 - Kells is identified in the NSS as one of the '*Urban Strengthening Opportunities*' in the GDA. The NSS characterises Urban Strengthening Opportunities as: '*These towns, located on important economic and transport corridors or in important locations and with a capacity to grow, must become a focus for the settlement policies of local authorities as incorporated in county development plans.*'
 - In the NSS, Kells is recognised as having a population of between 1,500-5,000 which

represents a smaller town in the national settlement hierarchy. The strategy identifies that such towns cater for local growth in residential, employment and service functions through enhancing the built environment, water services and public transport links. Thus, Kells should become a focus for residential growth, with the consequent requirement for additional services to meet the needs of its expanding population.

- The NSS recognises that Kells is located on a '*National Transportation Corridor*' which implications for the town in terms of the potential for population growth. The Mid East Region within which Meath, and consequently Kells, is located is a growing commuter area serving the Dublin conurbation and with the planned improvements to the N3 then Kells will increasingly become more attractive to Dublin commuters.
- In terms of the surrounding area, and consequently the Kells catchment area, the hinterland north west of Kells has been designated '*Village Strengthening and Rural Area Opportunities*', while that south east of the town is identified as having '*Strategic Rural Assets within a Metropolitan Hinterland*'. Thus, the Kells catchment area has the scope to be considerably strengthened under the strategic objectives of the NSS.
- Finally, Kells is only 16 km along the N3 National Primary Road from the County Town of Navan. Under the NSS, Navan has been designated as a '*Primary Development Centre*'. Such centres are seen as '*strategically placed, strong and dynamic urban centres*'. Thus, Kells as a satellite town of Navan should enjoy spin off benefits from the larger strategic centre.

- 2.5 The key influence of the NSS objectives, which are of particular importance to this evaluation, is that they recognise and provide the potential for Kells to grow at a faster pace than has previously prevailed. This requires to be taken full account of in population forecasts and subsequently the assessment of the requirement for additional retail floorspace.

Retail Planning Guidelines for Planning Authorities

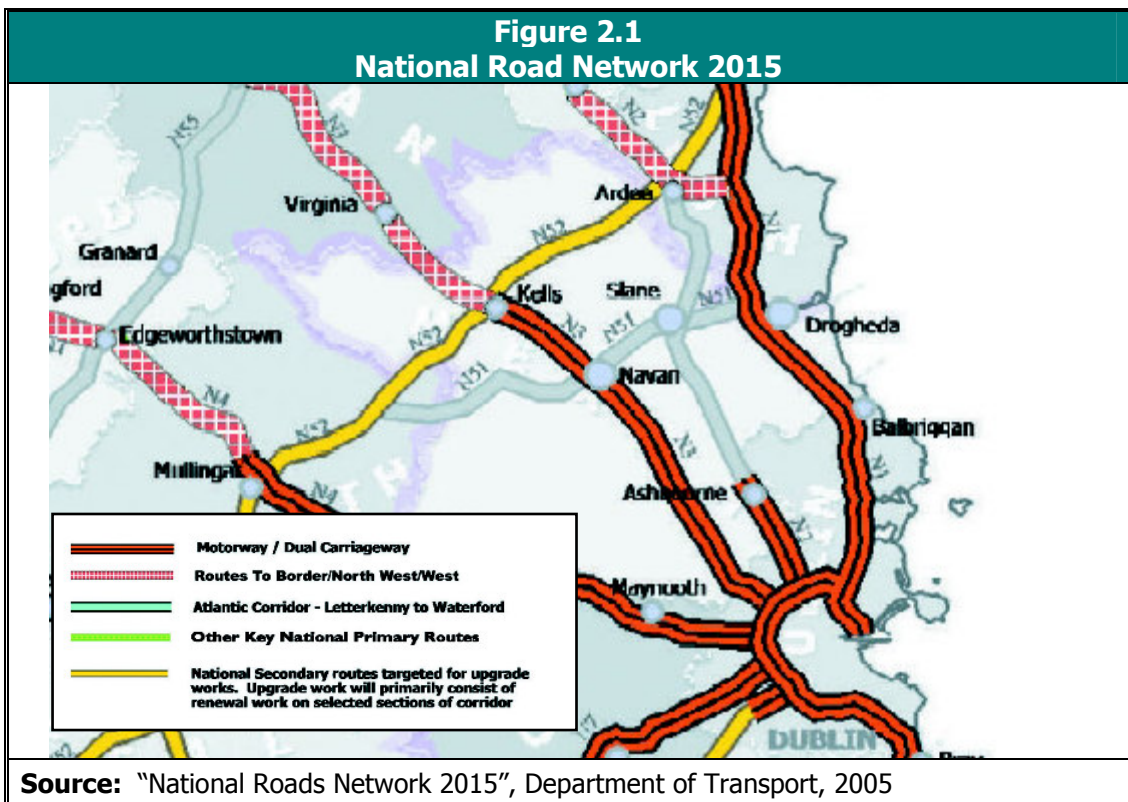
- 2.6 The 2000 RPG were an important influence on the approach adopted to the preparation of the County Retail Strategy. The DoEHLG undertook a limited review of the guidelines which was published in January 2005. The key change which emerged was the removal of the 6,000m² gross retail warehouse cap on individual large scale units in a very select band of potential locations. These were areas within '*Gateways*' which were covered by Integrated Area Plans under the 1998 Urban Renewal Act and thus the modification to the RPG does not have any implications for Kells or in fact any centre in the County.

Transport 21

- 2.7 Transport 21 was announced in November 2005 and, therefore, was well after the

preparation of the County Retail Strategy. It provides the Government’s €34.4 billion ten year capital investment framework for transportation covering the period 2006 – 2015 and will form a key input to the next National Development Plan (2007 – 2013). There are proposals in Transport 21 which could have consequences for the growth and potential of Kells. These include:

- i. Upgrading of regional and local bus services. This will include €9m per annum for the Rural Transport Initiative (RTI), serving in excess of 500,000 passengers;
- ii. Completion of the development of the N3 dual carriageway to Kells and beyond;
- iii. In terms of the GDA rail network, new rail services will serve Navan, being built out on a phased basis. Phase 1 of the Navan Rail Link is expected by 2009 and will include a spur from the Maynooth line to Dunboyne. The second phase will extend the service to Navan. Currently, the Government is being lobbied by business interests in Kells to extend the service further to the town; and
- iv. In terms of the national road network, Kells will be served by a motorway from Dublin. Additionally, the N52 National Primary Route linking Ardee to Mullingar via Kells has been targeted for the upgrading/renewal of selected sections of corridor. The proposed road network within the Kells’ sub region is illustrated in Figure 2.1.



- 2.8 Thus, under Transport 21 Kells will secure improved strategic accessibility and connectivity. This should act as a further stimulus to the growth of the town and requires to be taken into account in the evaluation of the current retail policy framework which prevails.

REGIONAL

- 2.9 The key regional level policy frameworks which are of particular relevance to the evaluation of Kells' retail planning and development potential are:
- Retail Planning Strategy for the Greater Dublin Area
 - Regional Planning Guidelines Greater Dublin Area.

Retail Planning Strategy for the Greater Dublin Area

- 2.10 The Retail Planning Strategy for the Greater Dublin Area (GDA Retail Strategy) was published in November 2001. There was a commitment in the strategy for it to be updated following the review of the Strategic Planning Guidelines for the GDA (SPG) but this has not happened. It does not appear to be on the regional agenda although an up date and review was identified in the RPPGDA, which superseded the SPG. There have, therefore, been no changes in strategic regional retail planning policy which would require any changes/responses in the County Retail Strategy or, as a consequence, at the more local Kells level.

Regional Planning Guidelines Greater Dublin Area

- 2.11 The RPPGDA were published in July 2004 and replace the SPG for the GDA. The guidelines introduce strategic regional level changes which have implications for Kells in the GDA settlement hierarchy and, thus, have consequences for the town's retail role and potential that require to be considered in this evaluation. The key differences can be identified as:
- i. Kells was not designated as having any particular strategic settlement role in the SPG whereas, under the RPPGDA, it has been designated as a '*Moderate Growth Town*' in the GDA Hinterland Area. Other towns/centres with this designation include: Lusk and Rush (both Fingal); Trim and Ashbourne (both Meath); Athy, Blessington, Kildare Town, Kilcullen and Monasterevin (all Kildare); and, Newtownmountkennedy (Wicklow). The guidelines characterise Moderate Growth Towns as: having a population range of 5,000 – 15,000; they should be on or near multi modal transport corridor, rail if possible; and, they should act as an attractor of major investment; and
 - ii. Unlike the SPG, the RPPGDA recognises the strategic linkages between Kells, Trim and Navan and combine the centres into a '*Primary Dynamic Cluster*'. Under this designation, Kells, together with Trim, has an interacting and supporting role to the adjacent RPPGDA

'Large Town' of Navan. The longer-term goal of the guidelines is that such centres should build upon such dynamism and develop a self-sufficient critical mass.

- 2.12 The recognised strategic importance of Kells and the benefits of its existing and potentially enhanced economic clustering with Navan and Trim in the RPPGDA open up the further scope for the retail role and importance of Kells to grow. This requires to be reflected in the re-evaluation of the retail planning and development baseline set out in the County Retail Strategy.

LOCAL

- 2.13 At the County and more local level, the key policy frameworks which have an influence on the future of Kells are listed below and examined in the paragraphs that follow. They are:

- Meath County Development Plan
- Meath County Retail Strategy
- Kells Development Plan.

Meath County Development Plan

- 2.14 The current Meath County Development Plan (CDP) was published in 2001 and the 2003 County Retail Strategy was incorporated as a variation to the plan. The CDP is currently being updated and reviewed and will cover the period 2007 – 2013. Thus, in the interim, there are no changes to County level policies which require to be taken into account in this evaluation. The findings and recommendations of study, in the absence of a full update and review of the County Retail Strategy, and the emerging town development plan will in fact inform the preparation of the CDP in respect of the land use planning and policy framework for Kells.

Meath County Retail Strategy

- 2.15 The Meath County Retail Strategy was published in 2003 and has not been reviewed since. There are, therefore, no changes in retail planning policy at the County level which require to be taken into account in this evaluation. However, in order to provide the baseline for the review of the retail planning policies for Kells, we summarise the key thrust of the retail planning policy framework for the town below:
- i. The designation of Kells as a Level 3 Sub-County Town Centre, along with Ashbourne and Trim, in the County Retail Hierarchy. This reflects the range, quality and quantum of retail floorspace plus the diversity of other town centre uses which prevail. Kells and

Trim have been identified because they perform a wide range of commercial industrial and community functions in the north and south of the County respectively, both towns are also major visitor destinations;

- ii. The County Retail Strategy designates both a Core Retail Area and, embracing but extending beyond this, a Town Centre Area. The designation of the latter was to provide guidance on the preferred location for new retail development in Kells – determining the appropriateness or otherwise of both the 2003 adopted Core Retail Area and Town Centre Area is an important component of this study;
- iii. The County Retail Strategy identifies that in order for Kells to sustain its role and importance as a Sub-County Town Centre then it requires a considerable strengthening of the town's retail offer, particularly in respect of main food shopping. It also identifies that there is a need to improve its comparison floorspace;
- iv. The County Retail Strategy recommends consolidation and enhancement of Kells Town Centre and highlights that if need is to be met locally and the town's retail offer strengthened then edge of and out of centre opportunities across all sectors of the retail market may need to be looked to;
- v. The County Retail Strategy highlights there are opportunities in all Sub-County Town Centres in the County over the period of the Strategy and that these could play an important role in enhancing the retail offer and importance of these centres. It advocates locating retail warehousing on edge of centre and out of centre locations as opposed to within the town centres themselves;
- vi. Policy RS3:Sub-County Town Centre – Kells and Trim states that: *'It is the policy of the Council to promote and encourage major enhancement and expansion of town centre functions to sustain the competitiveness and importance of Trim and Kells as Sub-County Town Centres and also to ensure that their unique heritage becomes integral to the offer and attraction of both towns.'*
- vii. The County Retail Strategy identifies that Kells and Trim are underperforming against other centres at the same level in the GDA retail hierarchy. It highlights they should be more self-sustaining with local people only needing to travel to meet their higher order shopping needs and that this will be increasingly important as Kells and Trim grow in population; and
- viii. The County Retail Hierarchy sets out the actions required for Kells, and Trim, to meet the policy objectives of the Strategy. These are:
 - *'Both Town Councils need to continue progress with regards land acquisition and site assembly in order that the opportunities for town centre development are secured.*
 - *'The County and Town Councils need to look at the emerging needs of existing and expanding residential areas specifically with regards to convenience shopping and ensure that the correct land use zonings are in place.*
 - *'Locations require to be identified and promoted for retail warehousing floorspace.*
 - *'Progress should be pursued as a priority on all road proposals required to untap the potential and attraction of sites within Kells and Trim town centres.*

- *There needs to be examination of the mechanisms that could assist the delivery of key town centre sites. This should include marketing strategies, the potential of Public Private Partnerships which is that which has been adopted in other centres and direct market testing of developers and operators.*
- *The preparation of heritage and interpretation strategies that embrace signage, linkages and interpretation.'*

2.16 It is three years since the County Retail Strategy was prepared. While there were up dates of certain baseline information, a key foundation of the Strategy was the baseline information collated in the preparation of the 2001 GDA Retail Strategy. Since then, there has been the publishing of the NSS, RPPGDA, the final results of the 2002 Census of Population and a whole suite of other economic data and information. While it may be found that the thrust of the County Retail Strategy policy objectives for Kells may change little, to ensure that there is a sound, up to date and defensible retail planning framework then these policies require to be appraised in the context of this very different baseline – and this in essence is the role of this study.

Kells Development Plan

2.17 The current Kells Development Plan was published in 2001 and, as such, was taken into account in the preparation of the County Retail Strategy. As has been noted, the up date and review of the Development Plan is currently underway and will be informed by the findings and recommendations for this study. Consistent with the emerging CDP, the plan period is 2007 – 2013. There is, therefore, no change in the Development Plan policy framework underpinning the retail planning and development of Kells. However, as the 2001 Kells Development Plan did inform the County Retail Strategy policies and objectives for Kells, it is important to this evaluation to rehearse what the key policy provisions of the plan were. These can be identified as:

- The facilitation and encouragement of the development of Kells as a major commercial, employment, social and tourist centre in north County Meath
- Allowance for sustainable residential development and expansion within Kells and the promotion of Kells as the main commercial and retail area within the plan area
-
- Encourage and develop Kells as a strong commercial centre, serving an extensive hinterland
- Zoning an area of land to the east of Bective Street for future commercial and residential development to assist in the consolidation of commercial and residential activities.
- 'Shop Major' is not permissible under the Kells Development Plan under any land use

zoning objective.

- 2.18 In addition to the up date and review of the Kells Development Plan, a LAP is being prepared for the 'Backlands Area' of the Town Centre Expansion Area. To date, a strategic issues paper was published in December 2004 and this has been examined as part of this review and evaluation. Ultimately, however, this study is set to inform the preparation of the Backlands Area LAP rather than vice versa.

CONCLUSIONS

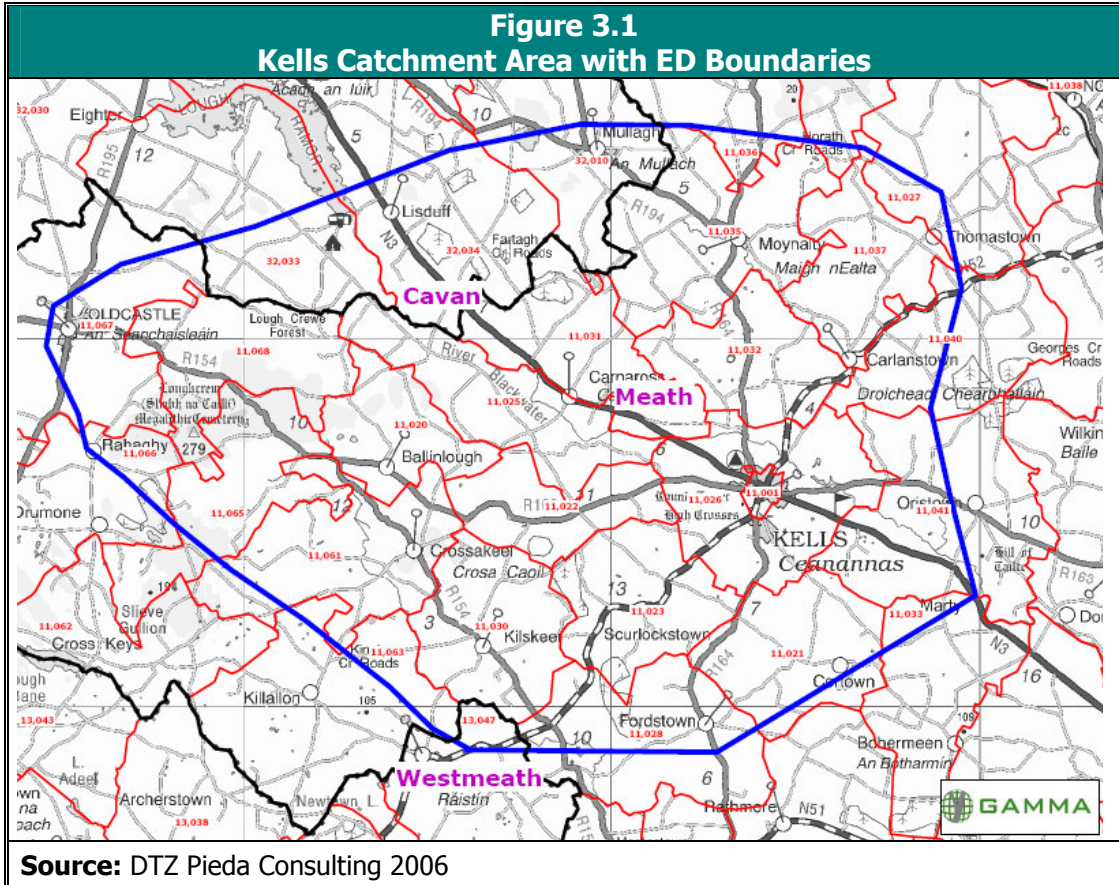
- 2.19 National and regional policy support for the development of Kells as a growing urban centre has greatly been strengthened since the publication of the County Retail Strategy through its designations as an '*Urban Strengthening Opportunity*' in the NSS and a '*Moderate Growth Town in the Hinterland Area*' and part of the Navan – Kells – Trim '*Primary Development Cluster*' in the RPGGDA. These designations recognise and provide the policy framework for Kells to grow at a faster pace than has previously prevailed. The scope and potential for this is further enhanced through the emerging improvements to the town's strategic accessibility and connectivity under Transport 21. These influences, plus the final results of the 2002 Census and other new economic data which have emerged since the County Retail Strategy was prepared, require to be taken full account of in the re-evaluation of the retail planning and development baseline set out in the Strategy and subsequently the assessment of the requirement for additional retail floorspace in the town.

3 CATCHMENT AREA AND POPULATION PROJECTIONS

- 3.1 A key part of any capacity assessment is to identify what the available expenditure capacity is to support additional retail floorspace in a defined catchment area – in this case the Kells catchment area. It is important to highlight that the capacity assessment in the County Retail Strategy was for the whole of the County and not for specific centres. The need to address this specifically for Kells is in response to the emerging proposals for new retail floorspace in the town.
- 3.2 Important inputs to the capacity assessment are the definition of the Kells catchment area and calculation of the current and projected population of that area and, thus, this section focuses on the following:
- i. Definition of the catchment area;
 - ii. Historic population trends; and
 - iii. The population projections appropriate to the catchment area.

DEFINITION OF THE CATCHMENT AREA

- 3.3 Definition of the catchment area was, in the first instance, founded on an analysis of the 5, 10 and 15 minute drive time isochrones surrounding Kells. These were then reviewed against the retail offer of the nearest higher order centres, smaller centres in the immediate hinterland of the town and the current retail offer of Kells. In respect of the higher order centres, these were identified as Navan and Ardee and taken to have a considerable influence on the shopping patterns of the area and effectively limit the extent of the Kells' catchment area to the south east and the north east respectively. In contrast, there are not the same higher order centres to the west and north west of the town and, as such, the derived Kells catchment area extends further within these areas. Based on these considerations, Figure 3.1 illustrates the derived Kells catchment area.



3.4 The population estimates for the derived catchment area were provided by GAMMA, the leading GIS mapping company in the country. For 2002, the population for Kells and its catchment area was estimated to be 13,213. It largely fell within Meath (90%) but also partially extended into Cavan (9.8%) and Westmeath (0.2%). The population figures for the catchment area are set out in Table 3.1.

Table 3.1 Kells Population Change		
Catchment	1996	2002
Meath	10,570	11,897
Westmeath	15	21
Cavan	1,062	1,295
Catchment Total	11,647	13,213

Source: GAMMA, 2006

3.5 Analysis of the table finds that the population of the catchment area grew by 13.4% between 1996 – 2002. This was considerably above the State average growth for the period (8.0%) but well below that for the County as a whole (22.1%), noting

that the 2002 Census found Meath to be the fastest growing county in the country.

HISTORIC POPULATION TRENDS

3.6 Historic population trends provide an insight into the comparative performance of a town or area and generally inform the approach which requires to be adopted in population forecasting. This built up from an examination of the both the local and wider context historic for the period 1996 – 2002 as follows:

- County Meath, other GDA Hinterland Area counties, the wider Region and the State
- Other Meath urban centres
- Kells Town, Environs and Rural Area.

County Meath, Other GDA Hinterland Area Counties, the Wider Region and the State

3.7 The population figures for each of the above are set out in Table 3.2. In terms of definitions, Meath, Kildare and Wicklow, with parts of Fingal, comprise the majority of the GDA Hinterland Area and form the Mid East Region.

Table 3.2 County, Region & State Population Change 1996 – 2002				
Area	1996	2002	Actual Change	% Change
Meath	109,732	134,005	24,273	22.1
Kildare	134,992	163,944	28,952	21.4
Wicklow	102,683	114,676	11,993	11.7
Mid East Region	347,407	412,625	65,218	18.8
GDA	1,405,671	1,535,446	129,775	9.2
State	3,626,087	3,917,203	291,116	8.0

Source: 2002 Census of Population, CSO

3.8 From the table, it is important to highlight the following:

- i. While Kildare had the greatest actual numerical population growth between 1996 – 2002, Meath had the highest percentage growth and, as noted above, this was the highest county percentage population growth in the country;
- ii. The County’s population growth (22.1%) was above that for the Mid East Region as a whole (18.8%); and

- iii. The County and Mid East Region’s population growth significantly outperformed that of both the GDA (9.2%) and the State (8.0%).

3.9 The significant growth in the County’s population against regional and national trends reflects its growing importance as the home for Dublin commuters in the face of increasing house prices in the city and its conurbation. While the RPPGDA seeks to redress this trend by consolidating population growth in the GDA Metropolitan Area, given the pressure of house prices/housing affordability in the conurbation and the greatly improving strategic accessibility of the County’s main centres then it is a trend which is set to continue for the foreseeable future and requires to be taken account of in population forecasting.

Other Meath Urban Centres

3.10 The role of the County in responding to the housing pressures of the Dublin conurbation is well demonstrated in the population increases which have occurred within and around its main centres between 1996 – 2002. These are all above, and in many cases significantly above, the County average because it incorporates the lower growth rates in the rural centres and towns more distant from the Dublin conurbation. This is illustrated in Table 3.3 which sets out the population figures for each of the larger centres in the County, in order of population size at 2002.

Table 3.3 Population Change Meath Urban Centres 1996 – 2002				
Area	1996	2002	Actual Change	% Change
Navan & Environs	12,810	19,417	6,607	52
Ashbourne	4,999	6,362	1,363	27
Trim & Environs	4,405	5,894	1,489	34
Laytown-Bettystown-Mornington	3,678	5,597	1,919	52
Dunboyne	3,080	5,363	2,283	74
Ceannanus Mór (Kells) & Environs	3,542	4,451	909	25
Ratoath	1,061	3,794	2,733	258
Dunshaughlin	2,139	3,063	924	43
Duleek	1,731	2,173	442	26
Source: 2002 Census of Population, CSO				

3.11 The main points which can be derived from the table which have an influence on the approach to population forecasting are:

- Kells and Environs witnessed a significant population increase of 25.0% but this was well below that of the majority of other main centres within the County largely due to

the town's relative comparative distance and poorer connectivity to the Dublin conurbation than the majority of other centres – it had the smallest percentage growth of all of the County's main centres over the period

- Its population growth was comparable to Ashbourne and Duleek, which grew by 27.0% and 26.0% respectively, both of which were closer to the conurbation but their growth was limited by infrastructure constraints
- Trim, which is also a RPPGDA Moderate Growth Town and the third part of the Navan – Kells – Trim Primary Dynamic Cluster, displayed growth of nearly 10% higher than Kells largely due to its greater proximity/accessibility to the Dublin conurbation but also its current greater attraction and ambience for living, working and leisure than Kells
- The centre which witnessed unparalleled growth was Ratoath (258.0%) which is not a designated centre in either the NSS or RPPGDA but was some three times that of Kells and Environs numerically which can be directly attributed to its greater proximity to the Dublin conurbation.

3.12 It can be anticipated that in view of the sustained pressures of the housing market in the GDA Hinterland Area that all of the main centres in the County will have continued to witness population increases significantly above those in the GDA and State as a whole in the period since 2002. Kells and Environs may have continued to comparatively under perform in the context of the County main centres but this should be set to change through the improvements to the town's increased accessibility and connectivity which will flow from the strategic investments under Transport 21.

Kells Town, Environs & Rural Area

3.13 The population trends for Kells Town, Environs and Rural Area between 1996 – 2002 are set out in Table 3.4. The table illustrates that while population growth in Kells Urban and Town Areas was significant and above the GDA and State levels, it was below that of the County as a whole. Additionally, consistent with the picture in the environs of cities and key centres around the country, the majority of the growth of Kells was located in the town's environs (37%) and this is set to be the picture based on residential land zonings in the current Kells Development Plan. In contrast to County, regional and national trends, the population of the Kells Rural Area witnessed a 12.0% decrease over the period. This, however, has to be put in the context of the actual numbers involved – the numerical population decline was only 22 which is insignificant in the overall picture. Additionally, between 1996 – 2002, there were changes introduced by the Central Statistics Office (CSO) in respect of Urban and Rural Enumeration District (ED) boundaries and thus the figures are not comparing like with like and the picture of decline is actually misleading. This noted, given the experience from other centres within the County, GDA and across the country, as Kells is a designated growth centre then this will have the effect of the increased urbanisation of its Rural Area and, thus, it can be anticipated that the

apparent trend of decline will be reversed.

Table 3.4 Population Change Kells 1996 – 2002				
Area	1996	2002	Actual Change	% Change
Ceannanus Mór (Kells) Urban	1,970	2,362	392	20
Ceannanus Mór (Kells) Town	2,152	2,522	370	17
Ceannanus Mór (Kells) Environs	1,390	1,899	509	37
Ceannanus Mór (Kells) Town & Environs	3,542	4,421	879	25
Ceannanus Mór (Kells) Rural*	182	160	-22	-12
Source: Census of Population, 2002, CSO				

POPULATION PROJECTIONS

3.14 As part of our analysis of the prospects for future population growth, population projections have been constructed for Kells Town & Environs and the catchment area. These are influenced by the recent trends set out above but also take account of other national and regional data and projections. While the majority of the catchment area is within the GDA, and hence the RPGGDA forecasts are a major input to the construction of more local area forecasts, it does extend into both the Borders and Midland Regions and thus these also have to be factored in. As such, reflecting these factors, our population forecasts are constructed from the following sources and data:

- i. NSS;
- ii. RPGGDA;
- iii. Regional Planning Guidelines for the Borders Region;
- iv. Regional Planning Guidelines for the Midlands Region;
- v. Kells Development Plan;
- vi. Emerging Kells Backlands Area LAP Strategic Issues Paper; and
- vii. CSO Regional Population Projections 2006 – 2021, May 2005.

3.15 Population projections are constructed on facts and trends but detailed demographic forecasting, especially over longer timescales, can only be viewed as a tool to inform decision making – history alone can validate whether predictions were right. This is a particular issue in dynamic and changing economies, such as has been the case in Ireland in recent years. We have given due regard to changing economic conditions

and, consequently, the range of relevant published population forecasts in our determination of what should be adopted as the basis for the construction of those appropriate to the Kells catchment area. However, in addition, it is important to highlight there is a degree of flexibility in respect of the approach to forecasting given that the NSS advises that there is still potential for significant growth above current trends and that this should be planned for if the objectives of the 20 year NSS spatial framework is to be achieved. As such, this potential should also be taken into account in population forecasting at town and catchment levels.

3.16 Reflecting the above considerations, the following are identified as key influences on the approach which requires to be adopted to constructing the population forecasts for the Kells catchment area:

- The NSS designation of Kells as an '*Urban Strengthening Opportunity*' and the fact that the majority of the catchment area to the north has been designated for '*Village Strengthening and Rural Area Opportunities*' and to the south/east as '*Strategic Rural Assets within a Metropolitan Hinterland*'. Kells is also located on a '*National Transportation Corridor*' with good accessibility and linkages with Navan, which is the designated County Town.
- The importance of Kells' potential as part of the Navan – Kells – Trim RPPGDA designated '*Primary Dynamic Cluster*'. In this capacity, Kells and Trim are set to have an interacting and supporting role to Navan which is designated in the guidelines as a '*Large Town*'. Additionally, Kells is designated as a '*Moderate Growth Town*' within the GDA Hinterland Area.
- Kells is a growing residential centre as evidenced in population trends between 1996 – 2002 but also from the recent house counts undertaken by the Council for the period since 2002. Based on these counts, and founded on an average household size of 2.9, then Kells and Environs current population is estimated to be of the order of 5,979. This represents a 35.0% growth since 2002 and confirms the growing importance of Kells as a commuter town for the Dublin conurbation.
- Based on extant residential planning permissions which are in the pipeline, the population growth of the town is set to continue in the short and medium term – the next five years.
- Further impetus can be anticipated to current trends in view of the improving accessibility and connectivity of Kells to the Dublin conurbation due to programmed investment in both road and rail infrastructure.
- The population trends and forecasts which prevail in the parts of the catchment area which fall within neighbouring counties and regions, namely Cavan and Westmeath which are located in the Midland and Border Regions respectively.
- The most recent CSO data and population trend information available at the national, regional and local levels.

3.17 Taking due regard of the above influences, in compliance with the approaches adopted at both the national and regional levels, both high and low population

projections scenarios were constructed for the catchment area. Under these scenarios, the Meath, Cavan and Westmeath parts of the catchment area were addressed separately as they are not only separate administrative areas in terms of county council boundaries but, as has been highlighted, they also fall into different regional authority areas. Table 3.5 provides the summary projections which are derived from the facts and influences with the paragraphs that follow specifically addressing the detail of both the 'Low' and 'High' population growth scenarios.

Table 3.5 Population Projections: 2006 – 2020					
Scenario	Av. Rate (%)	2006	2007	2013	2020
Low	2.7	14,691	15,088	17,730	21,471
High	6.0	16,339	17,260	24,351	37,608
Source: DTZ Pieda Consulting, 2006					

3.18 The above projections are founded on the 2002 baseline taken forward to the present year (2006), the emerging CDP and Kells Development Plan starting baseline (2007), the next CDP and Kells Development Plan projected population baseline (2013) through to the NSS and RPGGDA timescale horizons (2020). The approach adopted reflects the need to consider now the short, medium and longer term potential of Kells. It is adopted to ensure that the framework for retail and other land use policy and development decisions has a longer term perspective and that those which require to be made in the more immediate future do not prejudice the longer term proper planning and sustainable development of the town and its strategic importance in the County and Region.

Low Population Growth Scenario

3.19 The low growth scenario for Kells and Environs was derived from the RPGGDA which identify that the population of a Moderate Growth Town over the lifetime of the guidelines is expected to have the range of between 5,000 – 15,000. The low growth scenario assumes that Kells and Environs will have a population of 7,500 by 2016 which is the mid-point in the range and is based on an annual growth rate of 3.8%. This growth rate is broadly in line with the recent trends in Kells of 3.7% average annual between 1996 – 2002. Under this scenario, Kells and Environs would have an estimated population of 5,142 at 2006. This is some 14.0% less than the population estimates which have been constructed based on house counts and thus represents an underestimation of what the real picture and emerging trends are.

3.20 With regard to the remainder of the catchment area, population projections for the rest of Meath, Cavan and Westmeath are based on the most up to date version of the CSO Regional Population Projections covering the Mid East, Border and Midland regions respectively. The projections allow for 2.2% growth in the rest of the Meath

area, 1.2% growth in Cavan and 1.4% growth in Westmeath.

High Population Growth Scenario

- 3.21 The high growth scenario follows the approach set out for the low scenario but adopts a more aggressive growth pattern which sees Kells and Environs grow to 15,000 by 2016. This represents an annual growth rate of 9% which is significantly higher than that achieved between 1996 – 2002. However, it is closer to more recent trends than those up to 2002. Based on the high growth scenario annual average, Kells and Environs population would be estimated to be 6,269 at 2006 which is only 290 or 5.0% more than the house count estimates. It is, thus, not significantly different to what appears to be happening and is before the improvements to strategic roads and transportation infrastructure have been implemented. These should further increase the attraction of Kells to commuters and businesses alike at least as long as the economy remains strong and resilient. Over the longer period, it is likely that growth is will fall between the two scenarios.
- 3.22 In terms of the remainder of the catchment area, as with the low growth scenario, population projections were derived from each of the Regional Planning Guidelines for each of the respective regions. The high growth scenarios derived from the guidelines were 3% for the rest of Meath, 5.6% for Cavan and 0.5% for Westmeath.
- 3.23 For consistency, the high growth scenario applies the respective Regional Planning Guidelines projections to each of the constituent areas. However, these forecasts apply a lower growth rate for Westmeath than those set out by the CSO in the most recent regional population projections (as used in the low growth scenario above). This noted, the Westmeath part of the catchment area had a population of only 22 and thus the figures will not have any discernible effect on the overall projections.

CONCLUSIONS

- 3.24 The Kells catchment area experienced a population increase of 13.4% between 1996 – 2002, largely influenced by the 25.0% growth in the Kells and Environs population over the period which was well above national and regional growth rates. Founded on new homes built since 2002, the population in Kells and Environs is estimated to have grown by 35% to 5,979 at 2006. While below the 8,000 projection for 2006 set out in the Kells Development Plan, which was based on SPG guidance, it is a substantial increase that reflects the increasing attraction of the town for commuters to the Dublin conurbation. This trend is anticipated to continue over the coming years as strategic roads and transportation infrastructure are put in place and the accessibility and connectivity of Kells becomes increasingly enhanced.

- 3.25 Taking account of a range of influencing factors, particularly the projections in the different Regional Planning Guidelines which cover the catchment area, the population of the catchment area will increase from its 2006 level of 14,691 (low scenario) and 16,339 (high scenario) to between 17,730 (low scenario) and 24,351 (high scenario) by 2013 – the review date of the emerging CDP and Kells Development Plan. Given recent trends, the high scenario would be the more likely to be achieved but, any slow down in economic growth would result in growth likely to be between the low and the high growth scenarios. By 2020, the timescale of the NSS, the population under the low and high growth scenarios is projected to be 21,471 and 37,608 respectively and indicative of Kells achieving its strategic objectives under the NSS and RPPGDA.
- 3.26 The approach adopted in our population projections reflects the need to consider now the short, medium and longer term potential of Kells. It is adopted to ensure that the framework for retail and other land use policy and development decisions has a longer term perspective and that those which require to be made in the more immediate future do not prejudice the longer term proper planning and sustainable development of the town and its strategic importance in the County and Region.

- v. Accessibility;
 - vi. Diversity of Use;
 - vii. Vacancy Rates; and
 - viii. Recent Development.
- 4.3 Founded on data from other county retail strategies we have prepared, to further inform our assessment, we review the findings from the health check against data for selected comparator centres.

KEY CHARACTERISTICS

- 4.4 Kells grew from a monastic settlement, expanding in stages to its present day profile as an important urban centre serving a wide rural hinterland. The town is renowned for the Book of Kells, an illuminated manuscript of the four gospels written around the year 800AD. It is thus steeped in history and heritage and this is reflected in its many fine examples of architectural heritage, its designation as a heritage town and the statutory protection of its many archaeological sites and monuments. Of particular importance are the ancient monastery founded in the 6th Century by St. Columba, the round tower and several ancient crosses but there are many fine structures from the later Medieval, Norman and Georgian periods. The history and heritage of the town and its important location as a crossroads are preserved in the Medieval street pattern that still prevails.
- 4.5 Kells is an important centre in the County and regional settlement and retail hierarchies. It forms part of the Primary Development Cluster designated under the RPPGDA along with Navan and Trim and is a Level 3 Sub-County Town Centre in the GDA and County retail hierarchies.

DEFINITION OF THE TOWN CENTRE

- 4.6 As illustrated in Figure 4.2, Kells Town Centre is fairly compact and has built up around the former monastery. It can be broadly defined within the areas surrounding Farrell Street, New Market Street, Market Street, Suffolk Street and John Street. Given the limitations of its historic street network and retail footprints, it has been difficult to accommodate modern format stores within the traditional town centre and, as the figure illustrates, sites outside of the town centre have had to be looked to meet the requirements of retailers and shoppers in the town.

Figure 4.2
Town Centre & New Retail Areas



Source: DTZ Pieda Consulting, 2006

RETAIL MIX

- 4.7 In comparison to main centres of a similar size and importance in their respective retail hierarchies, Kells has a relatively limited retail mix. The majority of shops are owned and operated independently or under symbol group franchises with no representation of national or international multiples. The GDA Retail Strategy floorspace survey, conducted in late 2000, found that the town had a total net floorspace of 5,497m² comprising 33.0% convenience, 62.0% comparison and of the order of 5.0% vacant floorspace. The predominance of comparison floorspace is not in keeping with what is typically envisaged for Sub-County Town Centre, as outlined in the GDA and County retail hierarchies, which indicate that centres at this level in the hierarchy would normally have a greater convenience shopping role. The pending introduction of the enhanced SuperValu store should change the balance between convenience and comparison floorspace and, thus better fit the prescribed role and function of Kells in the retail hierarchy.

- 4.8 The main convenience store in the town is the symbol group SuperValu on Circular Road, which is being upgraded/expanded, with other convenience outlets including a number of small independent grocers, butchers and newsagents which are distributed around the town centre. Comparison shopping, while the predominant sector of the retail market in the town, is still very limited and comprises a handful of boutiques, shoe shops and hardware stores – all independently owned and operated. The retail profile indicates that local people will have to travel to higher order centres to meet the majority of their convenience and comparison shopping needs. While there are no specific household or shopper surveys to confirm this, from experience from other similar centres where surveys have been undertaken, it is anticipated that the result is a high level of expenditure leakage from the town and its catchment area. It is, thus, under performing as a Sub-County Town Centre in the County and GDA retail hierarchies.

ENVIRONMENT

- 4.9 Kells Town Centre has witnessed little new retail investment in recent years. The retail environment is characterised by traditional shop fronts and footplates. Plate 4.1 provides examples of typical traditional shop fronts found in the town centre. However, many are not of this quality and condition.



- 4.10 The general urban environment of the town centre, while greatly benefiting from the richness of its architectural heritage, is in need of improvement if the town's attraction and ambience are to be enhanced. Of importance is the fact that there has been a general decline in the environment since the 2003 County Retail Strategy health check was undertaken. The key issues which prevail can be summarised as:
- The high level of vacant properties – retail, other commercial uses and residential – along many of the streets undermine the appearance and attraction of the town centre giving it to differing degrees in different locations a general atmosphere of

neglect and disrepair.

- The town centre, and town as a whole, suffers seriously from traffic congestion due to its location on and at the intersection of the N3 and N52 roads which bring heavy throughputs of non-essential heavy goods vehicles (HGV) and cars. This should be ameliorated to a degree with the completion of the programmed N3/M3 dual carriageway.
- The town centre has had little investment in environmental improvements and the general public realm. Apart from Farrell Street, where there is some street furniture, there is very little planting and street furniture to enhance the urban environment. The relatively poor quality of the environment is well illustrated by the fact that it was not a centre which has been placed in either the recent national Tidy Towns or County Pride of Place schemes. Kells did, however, win an award for 'Derelict Site Improvement' of Youthreach and third place for 'Best Individual Achievement' for the Market Cross Garden – both of which illustrate the impact that can be achieved when the right investment is made.

ACCESSIBILITY

4.11 While located in the Hinterland Area of the GDA, the majority of the County is rural in character. As with most rural areas around the country, even with the RTI, public transport provision is poor and the majority of people rely on the private car. At the town level, Kells is too small to sustain a public transport network apart from that along the main routes which converge on the town centre – this is not unique to the town but a common feature of towns in rural areas around the country. These facts have implications for accessibility to the town and within the town which can be summarised as:

- i. **Pedestrians:** due to the compact nature of the town, most areas are accessible by foot. However, at the time of the health check, it was observed that most shoppers came into the town centre by car. Pedestrian flows were found to be greatest in the Farrell Street and Bective Street areas;
- ii. **Car Parking:** on-street parking is permitted on most streets throughout the town centre and there is a number of Council pay and display operated car parks. The largest car parks are located to the front of the Kells Shopping Centre on Circular Road and to the rear of the Library off Castle Street, with the church car park on the Navan Road also being important due to its relatively central location;
- iii. **Road:** it has been highlighted that the town is located at the intersection of the N3 and the N52 which bring high volumes of non-essential traffic through the town centre. Congestion is further exacerbated by Kells' location at the intersection of the R154, R163 and R164 Regional Roads. The programmed N3/M3 Clonee – Kells motorway will bypass the town and relieve the level of congestion that currently prevails but this is unlikely to take effect until 2010. Until that time, congestion will continue to be an issue and detract from the attraction and ambience of Kells Town Centre;
- iv. **Bus Services:** along the N3 between Dublin and Cavan via Navan are relatively regular but this does little to service the wider rural catchment area of the town; and

- v. **Rail:** as has been highlighted in Section 2, a rail link to Navan is proposed under Transport 21 and business interests in the town are campaigning for this to be extended to Kells. While this would be a significant boost to the town and its attraction for living, working, leisure and investing in, in the national and regional public transport agendas it is a small/moderate sized town and, as such, it can be envisaged that this would be not be an immediate strategic investment priority.

DIVERSITY

4.12 Kells has a relatively wide range of uses synonymous with its role as an important urban centre for its wide rural hinterland. In addition to retailing, these include:

- **Leisure and Recreation:** for a centre of its size, Kells has a good range of amenities including sporting facilities and clubs. It is home to the GAA club at Parc Columcille, which has a playing field situated off Bective Street. Kells Swimming Pool along the Navan Road provides a range of activities including School Swimming, Aquafit, Sub Aqua, life guarding and competitive swimming. In addition, there is a tennis club, equestrian centre, archery school, badminton and two 18-hole golf courses.
- **Social/Entertainment:** there are a number of restaurants and public houses, including the Headfort Arms, Vanilla Pod restaurant, the Keltic Bar and a range of smaller establishments. These are of varying but improving quality but, on the whole, would not appear to provide the quantum and quality of supporting infrastructure to harness the attraction and potential of Kells as a tourist destination or its potential role as a key centre for evening entertainment for its hinterland population.
- **Residential:** as with many traditional small/moderate sized towns around the country, people live in the town centre and commercial uses are interspersed by dwellings. Radiating out from the centre, residential uses increasingly predominate along the main roads. As reflected in the considerable population growth between 1996 – 2002, and the new housing which has been developed in the interim period to 2006, the town is spreading into its environs with the development of a host of new housing estates.
- **Services/Commercial Uses:** in the town include: a Post Office; library; medical and dental; financial and banking; legal; auctioneers/estate agents; hairdressing and beauty; and, garages and car dealerships.
- **Education:** reflecting its role as the key centre for its surrounding and extensive hinterland, Kells has a very large number of schools for the size of the town itself plus the Kells VEC Adult Education Centre which all play an important role in the local economy and community life. The schools are: Eureka Secondary School; Kells Community School; six National Schools – Ballinlough, Carnaross, Drunbarragh, Kells Parochial, St Bridgid and St Colmcille; and Our Lady of Mercy Primary School.
- **Industrial/Commercial:** the key focus of industrial and commercial activity is the successful Kells Business Park. It is located approximately 1km from the town centre and has been established for approximately five years. The business park is a

modern, fully serviced office and industrial park with land available for future development. It has a range of multinational, national and local companies plus is the headquarters of the North Eastern Health Board. Businesses include: Bective Precision; Kells Hire; Smurfit & News International; and, Young’s Bakery.

- 4.13 Table 4.1 summarises the diversity of uses in Kells and, with the exception of the large number of schools listed above, illustrates that the town has little in the way of public services or supporting cultural infrastructure. This will be greatly redressed following the major extension of Kells Town Hall which is currently under construction and due to be completed this summer.

Table 4.1 Diversity: Kells	
Banks & Building Societies	AIB Bank, Bank of Ireland, National Irish Bank, Best Mortgages and St Colmcilles (Kells) Credit Union.
Post Office	Farrell Street.
Restaurants	Vanilla Pod Restaurant, Headford House Hotel, the Ground Floor Restaurant and number of take aways.
Public Houses	There area a large number of bars scattered throughout the town centre, some offering hot food as well as drinks.
Hotels	Headford House Hotel.
Offices	Residential and retail uses predominate – however, there are a number of offices dispersed around the centre, both on upper floors and at ground floor level.
Residential	Residential properties intersperse the retail uses along most streets in the town centre. Large residential estates dominate the environs of the town with several new estates at various stages of construction.
Miscellaneous	Garda Station, Library, opticians, doctors, dentists, pharmacies, professional services – architectural/design, accountants, auctioneers/estate agents and solicitors.

VACANCY RATES

- 4.14 A key indicator of the health of a town centre is the level of retail vacancies that prevail. The floorspace survey which was conducted as part of the preparation of the 2001 GDA Retail Planning Strategy, the results of which were incorporated in the County Retail Strategy, identified that of the 5,497m² total net floorspace in Kells, there was 276m² of vacant retail floorspace. This represented a vacancy rate of 5.0% and comprised only two properties. It is a relatively low level of vacancy and indicative of a relatively healthy centre.

4.15 The briefs for the preparation of the County Retail Strategy and this study did not include up dating the GDA Retail Strategy floorspace survey. However, in respect of this study, a component of the health check was to identify the number of vacant properties. The assessment reveals that there has been a significant increase in the number of vacant properties from 2 to 21, particularly within and immediate to the designated Core Retail Area of the town centre. This would translate into a considerable increase in the quantum of vacant floorspace and take it to a level which is a matter of concern. The vacancies include retail, commercial and residential properties and they greatly detract from the attraction and ambience of Kells Town Centre. They serve to indicate that Kells has the characteristics of a town centre in decline. To illustrate this, Table 4.2 provides a comparative picture of the position at 2000, when the GDA Retail Strategy floorspace survey was undertaken, against that of the March 2006 health check conducted as part of the preparation of this study.

Table 4.2 Vacancy Units		
Location	2000	2006
Cannon Street		2
Carrick Street		1
Castle Street	1	4
Farrell Street		1
Kells Shopping Centre		2
Market Street		6
Maudlin Street	1	2
Suffolk Street		3
Total	2	21
Source: DTZ Pieda Consulting, 2006		

4.16 Plate 4.2 illustrates the impact of vacancies on the attraction and ambience of the town centre.



RECENT DEVELOPMENT

4.17 While the town centre is displaying a number of issues which require to be redressed, Kells has enjoyed recent development and considerable market interest across a number of market sectors that indicate, in accord with its NSS, RPGGDA and County Retail Strategy designations, it is a growing town which has considerable short, medium and longer term potential within the framework of the prescribed national, regional and local settlement and retail hierarchies. This is illustrated by examination of the following market sectors:

- i. Residential;
- ii. Retail; and
- iii. Other.

Residential

4.18 Consultations with local auctioneers/estate agents indicate very strong demand for residential development land and, while there has been historically a surplus of residentially zoned lands, the emerging position is that supply is beginning to outstrip potential demand. The anticipation that additional land requires to be forthcoming and zoned in the emerging Kells Development Plan is reflected in the unprecedented land values that are being achieved for unzoned land. This is well illustrated by the open market price of the order of €700,000 per acre which was achieved for unzoned land. The demand is predominantly coming from the Dublin conurbation commuter market and improvements to the strategic road and rail infrastructure will

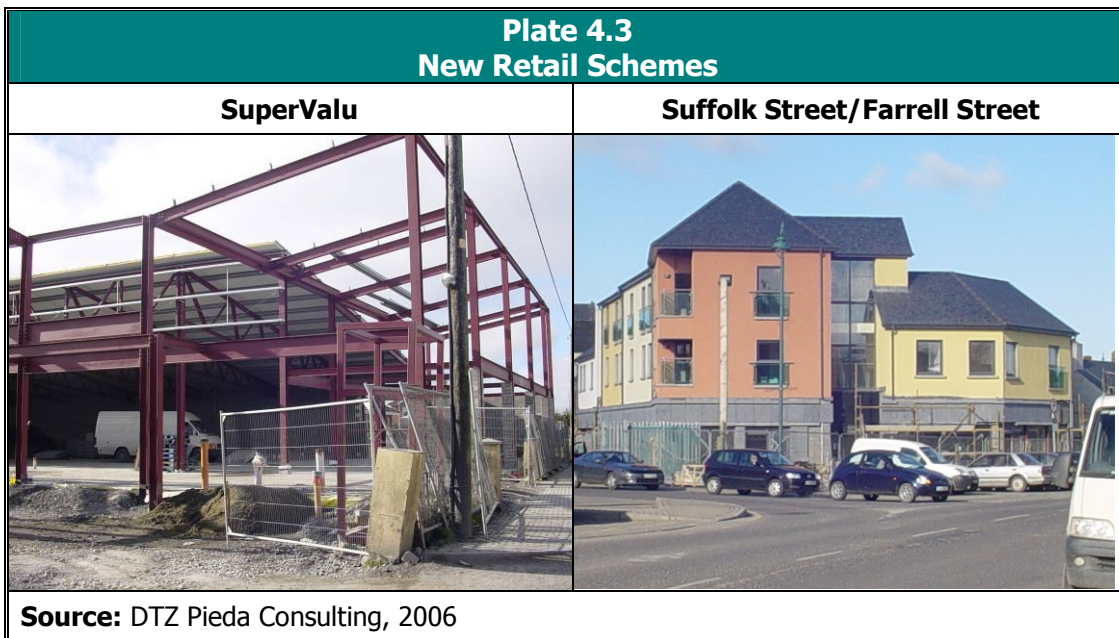
further fuel this in the medium and longer term. The scale and potential of the town's growth and potential is illustrated by the range of larger residential developments which have happened or are in the course of being built out in Kells. These include:

- Westfield, Bective Street
- The Glebe, on Maulin Road
- Bective Place, Gardenrath Road
- Townsparks Manor, Rockfield Road
- Tobar Ban, Oldcastle Road
- Rochford Hall, Cavan Road
- Cherryhill Court, Moynalty Road.

Retail

4.19 As has been previously highlighted, the town has witnessed limited new retail development/investment in recent years but what has happened, or is emerging, indicates a more positive future which is founded on the growth of Kells and recognition of its important role as a Sub-County Town Centre in the GDA and County retail hierarchies. The key new investments are summarised below and illustrated in Plate 4.3:

- i. **SuperValu:** this new edge of centre store, located on the Circular/Cavan Road, is the single largest new retail investment in the town. It will replace the existing store which will be demolished and provide reserved customer car parking. The development comprises: a single storey supermarket incorporating an off-licence (1,388m² net floorspace); storage area and ancillary offices on two floors; and, 4 retail units (451m² net floorspace); and
- ii. **Southern end of Suffolk Street and Farrell Street:** this scheme is close to completion and comprises a 350m² 3-storey development with retail on the ground floor retail. Occupiers for the development are yet to be confirmed.



Other

- 4.20 In addition to private sector investment in the town, Kells Town Council is extending the Town Hall by more than threefold from nearly 300m² to over 930m² at an estimated cost of €4 million. As has been highlighted, the project is programmed for completion this summer. It will provide a One-Stop-Shop for a range of local authority services to the public including planning, housing and motor tax.

COMPARATIVE REVIEW

- 4.21 In selecting the comparator centres, we reviewed the host of county retail strategies that we have prepared across the country. Our review found that the best comparators were the other Sub-County Town Centres in the GDA, given that to equal or lesser degrees they are all influenced by the pressures and opportunities emanating from the Dublin conurbation. Table 4.3 identifies the towns, their 2002 populations (town and environs), the percentage increase in the level of population and the data available on their total retail floorspace available from the respective county retail strategies.

Table 4.3 Comparative Review			
Sub-CountyTown	2002 Population	1996 – 2002 % Increase	Floorspace (m²)
Meath			
Ashbourne	6,362	27	9,487
Kells	4,451	25	5,497*
Trim	5,894	34	8,253
Fingal			
Balbriggan	10,294	21.5	7,369
Kildare			
Athy	6,094	14	8,068
Kildare Town	5,694	36	3,142
Wicklow			
Arklow	9,993	16.8	8,558
Source: DTZ Pieda Consulting 2006			
Note: * excludes SuperValu scheme			

4.22 The table illustrates that Kells was the smallest of the GDA Sub-County Town Centres in 2002 but had the fourth largest percentage growth in population between 1996 – 2002. Given the rate of growth that is known to be happening in all of the centres since 2002 then, while Kells can be anticipated to have again significantly grown in size – the new house counts bear witness to this, it is unlikely to have caught up on the other centres – this will only be confirmed or otherwise from the results of the 2006 Census of Population.

4.23 Based on the floorspace data in the respective county retail strategies, Kells is found to have the second lowest quantum of retail floorspace against that of the comparator centres with only Kildare Town having a smaller amount. However, it is important to highlight that there have been many existing or emerging changes in the different centres in respect of new retail floorspace and we summarise what we understand is the current position for each below:

- **Ashbourne:** saw its floorspace significantly increase post 2003 (after the County Retail Strategy was published) with the opening of the Ashbourne Town Centre scheme. We understand that subject to traffic issues being resolved proposals are emerging for Phase 2 of the centre and the Dardis and Dunne site. There is, therefore, market interest and potential for Ashbourne to increase its net retail floorspace at least twofold over the period of the CDP – circa 20,000m.
- **Trim:** has witnessed considerable market interest in new retail floorspace in and around the town. There is scope for Trim to at least double its floorspace over the timescale of the CDP – circa 17,000m².
- **Balbriggan:** reflecting the increasing urbanisation of the town and its strong

linkages to the conurbation, was redesignated as a Hinterland Area Tier 1 Level 3 Town Centre in the review of the Fingal County Retail Strategy. It is set to grow to a population of 25,000 over the period of the RPPGDA and is well on course for this to be achieved sooner rather than later. There has been considerable market interest in town centre, edge of centre and out of centre locations and Balbriggan could see its total floorspace increase threefold over the period to 2013 – circa 22,000m².

- **Athy:** has witnessed little new retail floorspace with the main new entrant being a discount convenience store. There is market interest in the regeneration of the town centre backlands and in larger scale convenience floorspace and these will increase the town's floorspace two fold over the period to 2013 – circa 16,500m².
- **Kildare Town:** has witnessed a dramatic change in its retail profile and attraction in the last two years and is set to increase its net floorspace by of the order of 13,000m² by 2007. A major win has been the attraction of the GDA's only Factory Outlet Village. It is anticipated that Kildare Town's attraction will be sustained in the period to 2013 with the potential for its retail floorspace to head towards a total of 20,000m².
- **Arklow:** is a vibrant and attractive town centre which has seen new and emerging schemes increase its total floorspace by 6,000m². There are proposals being considered by the Town Council for a new shopping centre located on the town's waterfront. Arklow is likely to witness its floorspace increase threefold over the period to 2013 – circa 23,000m².

4.24 Currently, with the SuperValu scheme, Kells net floorspace totals some 6,904m² – a figure which is significantly below what is being delivered within the other Sub-County Town Centres within the GDA. While it is the smallest centre – the population gap is not so significant to result in the significant disparity of the quantum of its retail offer against that of the other Sub-County Towns. Factors which can be taken to have inhibited its retail growth and attraction are accessibility/connectivity with the Dublin conurbation and its proximity to the higher order centre of Navan. While these may have been factors in the past, they should not hold true for the future based on the following considerations:

- i. Kells is slightly further from Dublin than either Athy or Arklow but both of these are reaping the benefits of their enhanced accessibility and connectivity through strategic road improvements – as reflected in the quantum of retail floorspace which is emerging or has happened;
- ii. In recent years, Kildare Town has benefited from the opening of the M7 motorway/bypass of the town which has significantly removed the congestion which prevailed and detracted from Kildare Town as a place for living, working and leisure. The road has opened up the accessibility/connectivity of the town and this has been responded to by the market. It is acknowledged that Kildare Town is a good 20km closer to the conurbation and benefits from also being close to the M9 and N8 junctions and thus is better strategically located than Kells. However, it has not only one Hinterland Area Level 2 County Town Centre on its doorstep but two – Naas and Newbridge. Both of these centres are significantly growing in retail profile and size, particularly Newbridge with the imminent opening of the higher Whitewater Shopping Centre. The important message is that this has not deterred the market investing in Kildare Town

- 4.25 There is therefore substantial scope for Kells to grow in size based on the experience from other Sub-County Town Centres around the GDA. In each, as with within the County, there has not been a laissez faire approach to granting new floorspace – it has been guided by development plan policies and objectives and through applying the assessment criteria set out in their plans/respective county retail strategies. Reflecting that different types of retail formats have different sized catchment areas – for example, the Kildare Town Factory Outlet Centre will draw trade from a drive time catchment of two hours – then in addressing the capacity and potential for additional retail floorspace, it is clear that being too prescriptive could undermine Kells achieving parity of retail offer ad quantum with other GDA Sub-County Town Centres.

CONCLUSIONS

- 4.26 It is clear that Kells is growing in size and importance within the GDA and County settlement hierarchies, as evidenced by the residential developments which have taken place or are in the pipeline plus in the success of the Kells Business Park. This is in accord with the national and regional strategic objectives for the town, as set out in the NSS and RPPGDA. While there is new retail investment in and around the town centre, the current position illustrates that the centre has declined substantially since 2000 when the GDA Retail Strategy floorspace surveys were undertaken. This is evidenced by the significant increase in the number of vacant retail units since 2000 and the 2006 health check conducted as part of this study.
- 4.27 In addition, review of the quantum and quality of the retail offer of the town indicates that local people are relatively poorly served in terms of both convenience and comparison floorspace and, as such, have to travel to higher order centres – such as Navan and Blanchardstown, and to a lesser degree Ardee – to meet the majority of their main shopping needs. From the comparative review of the offer and potential of other Sub-County Town Centres in the GDA, Kells is greatly underperforming in its role at this level the GDA and County retail hierarchies but the conditions are in place for this to be substantially redressed. The emerging town centre schemes will make an important contribution to this being achieved and Kells maturing into its Sub-County Town Centre role and profile. For the potential to be maximised to the benefit of the town centre as a whole then there will be a need to ensure:
- Integration/strong linkage between new schemes and the traditional heart of the town centre
 - Balancing investment in the town centre, particularly in respect of the public realm and interpretation/promotion of Kells unique heritage and importance.
- 4.28 Failure to squarely address these issues will fuel displacement of retail and other commercial activity from the Core Retail Area/wider town centre and, more than

likely, further accelerate the decline of the traditional heart of the town.

5 EXPENDITURE AND TURNOVER ESTIMATES

- 5.1 This section sets out the estimates and projections of potential population expenditure and the turnover of retail outlets in the Kells catchment area. Both of these factors are key components in determining the capacity for additional floorspace in the catchment area.

EXPENDITURE ESTIMATES

- 5.2 We have generated estimates for convenience and comparison expenditure following the standard approach we have used in retail strategies and RIAs around the country. The per capita expenditure figures for the County are set out in Table 5.1 below. All monetary values are stated in 2002 prices and take into account the latest available information from the 2002 Annual Services Inquiry (ASI)* and the County Incomes and Regional Gross Domestic Product (GDP) statistics published by the CSO in May 2005.

Table 5.1						
Per Capita Expenditure Estimates for Meath						
Category	2006	2007	2013	2019	Growth 2007-2013	Growth 2013-2019
Convenience	2,869	2,912	3,184	3,482	9.3%	9.3%
Comparison	3,308	3,433	4,338	5,472	26.3%	26.1%
Source: 2002 ASI and County Incomes and Regional GDP, CSO.						
*Although 2003 ASI figures are available, the corresponding figures from County Incomes and Regional GDP awaits publication from the CSO, due out late April 2006. Thus, 2002 prices are used						

- 5.3 Applying the projected population figures for the catchment area from Section 3 to the per capita expenditure estimates provides an estimate of the total amount of available convenience and comparison expenditure in the catchment area. This is set out in Table 5.2 for both the low and high population growth scenarios. The table illustrates that comparison expenditure growth is increasing at a faster rate than that of convenience. This is evident across the country and reflects a maturing retail economy.

Table 5.2 Total Expenditure Estimates for Kells Catchment Area Residents (€m, 2002 prices)						
Category	2006	2007	2013	2019	Growth 2007-2013	Growth 2013-2019
Convenience						
<i>Low Population</i>	42.1	43.9	56.5	72.7	28%	29%
<i>High Population</i>	46.9	50.3	77.5	122.8	54%	58%
Comparison						
<i>Low Population</i>	48.6	51.8	76.9	114.3	48%	49%
<i>High Population</i>	54.0	59.3	105.6	193.0	78%	83%
Source: 2002 ASI and County Incomes and Regional GDP, CSO. *Although 2003 ASI figures are available, the corresponding 2003 figures from County Incomes & Regional GDP await publication from the CSO, due out late April 2006. Thus, 2002 prices are used						

TURNOVER ESTIMATES

- 5.4 The current turnover of retail outlets in the catchment area can be estimated by using the expenditure potential of the catchment area’s population plus information on inflows and outflows of expenditure. These are defined as follows:
- i. **Market share:** the proportion of total expenditure by the catchment population that is retained in the catchment area; and
 - ii. **Trade draw:** the proportion of total turnover that is due to persons living outside of the catchment area.
- 5.5 Preferably, assumptions on both market share and trade draw are derived from household and shopper surveys respectively. In the absence of these then the assumptions require to be informed by professional judgement and this has a sound foundation based on the following:
- The market share and trade draw estimates provided by the GDA Retail Strategy
 - The findings of the Kells Town Centre health check
 - Our knowledge of surrounding centres both within and outside of the catchment area
 - Work we have undertaken on similar centres around the country which has been informed by specially commissioned household and shopper surveys
 - Our knowledge of the County from the preparation of the adopted County Retail Strategy.

Market Share Assumptions

- 5.6 Kells at present has a convenience retail offer that is attracting both main food and top up shopping by residents of the surrounding area. It is thought that there is considerable passing trade and a level of tourist spend although this could be considerably strengthened if there was a stronger retail offer to 'capture' more of that spend.
- 5.7 As the town expands, it has the potential to further develop its role as a strong Sub-County Centre as long as the growth of the retail offer expands to meet current need and in future expands or exceeds the growth in population so that more of its residents' shopping needs are met locally. There is considerable scope and potential to increase Kells' market share for both convenience and comparison goods over time, particularly given the level of residential development happening in and around the town.
- 5.8 From our town centre health check and consideration of the changing retail landscape in Kells since the GDA Retail Strategy, it is our view that following the introduction of a new retail development of some size, the town's market share will increase to about 60% for convenience goods and to 15% for comparison goods. It is likely that this will not take place until 2010/2011 allowing for time-lag associated with gaining planning permission, construction period and given the potential for an appeal to An Bord Pleanála – which can be anticipated due to the importance of the heritage and architecture of the town. The effect of any substantial increase in the town's floorspace, based on experience from other comparable centres, would be anticipated to increase the proportion of convenience and comparison expenditure retained in the town. There will still be retail expenditure leakage to higher order centres and this can be anticipated to continue, reflecting the role and function of the town in the County and GDA retail hierarchies.
- 5.9 The small projected increase in the town's convenience market share in the short term reflects the completion of the SuperValu development and consequently the slightly greater retention of convenience spend/main food shopping trips post 2006.

Trade Draw Assumptions

- 5.10 From the health check, it is envisaged that there is limited trade draw into the catchment area of 10% and 5% for convenience and comparison goods respectively. This reflects the relatively poor retail offer in the town, but does take into account its location as a node on the N3 and N52 National Secondary Roads, its proximity to the Navan and Trim, and the fact that the area does attract visitors all year round. Such trade is primarily attracted to SuperValu and a variety of independent comparison retailers. There is potential for tourism in the peak and shoulder holiday months to

greatly increase trade draw within the catchment area, particularly given the history and heritage of the area, and the improved access on completion of the M3.

- 5.11 Looking ahead, any large retail development will serve to increase the levels of trade draw to the catchment area. This will be a result of more people on the edge of the catchment area choosing to come to Kells instead of Navan, Trim and Cavan for an increased proportion of their main food and comparison shopping. Consequently, it is reasonable to assume that trade draw for convenience will be of the order of 15% and the level of comparison trade draw will increase to 10%.

TURNOVER ESTIMATES

- 5.12 Table 5.3 applies the assumptions underpinning each of the scenarios to our calculation of the projected gross expenditure potential of the catchment area.

Table 5.3 € Turnover of Retail Outlets in Kells Catchment Area (2002 prices)						
Year	Convenience		Comparison			
	Low	High	Low	High		
2006						
Resident Expenditure		42.1	46.9		48.6	54.0
Less Expenditure Outflow	70%	29.5	32.8	95%	46.2	51.3
Spend by Residents in Outlets in catchment area		12.6	14.1		2.4	2.7
Add Imported Expenditure	10%	1.4	1.6	5%	0.1	0.1
Total Spend in Catchment Area		14.0	15.6		2.6	2.8
2007						
Resident Expenditure		43.9	50.3		51.8	59.3
Less Expenditure Outflow	60%	26.4	30.2	95%	49.2	56.3
Spend by Residents in Outlets in catchment area		17.6	20.1		2.6	3.0
Add Imported Expenditure	15%	3.1	3.5	5%	0.1	0.2
Total Spend in Catchment Area		20.7	23.7		2.7	3.1
2013						
Resident Expenditure		56.5	77.5		76.9	105.6
Less Expenditure Outflow	40%	22.6	31.0	85%	65.4	89.8
Spend by Residents in Outlets in catchment area		33.9	46.5		11.5	15.8
Add Imported Expenditure	15%	6.0	8.2	10%	1.3	1.8
Total Spend in Catchment Area		39.9	54.7		12.8	17.6
2019						
Resident Expenditure		72.7	122.8		114.3	193.0
Less Expenditure Outflow	40%	29.1	49.1	85%	97.1	164.0
Spend by Residents in Outlets in catchment area		43.6	73.7		17.1	28.9
Add Imported Expenditure	15%	7.7	13.0	10%	1.9	3.2
Total Spend in Catchment Area		51.3	86.7		19.0	32.2
2020						
Resident Expenditure		75.9	132.9		122.1	213.9
Less Expenditure Outflow	40%	30.4	53.2	85%	103.8	181.8
Spend by Residents in Outlets in catchment area		45.5	79.7		18.3	32.1
Add Imported Expenditure	15%	8.0	14.1	10%	2.0	3.6
Total Spend in Catchment Area		53.6	93.8		20.4	35.6

5.13 The table illustrates that, with population growth and improvements in Kells’ retail offer, the estimated turnover of retail outlets in the catchment area will increase from between €14.0m – €15.6m in 2006 to between €39.9m – €54.7m in 2013 for convenience goods and from under €3m to between €12.8m – €17.6m for

comparison goods.

- 5.14 With respect to estimating turnover levels for existing floorspace in the catchment area, from the Retail Strategy and our health checks, we estimate that there is a total net convenience floorspace of 1,811m² in the catchment area. Taking an average of the turnover under the high and low scenario, this implies an average floorspace turnover ratio of €8,172 per m² of net floorspace. Based on our work around the country, this represents a considerable degree of 'undertrading' and reflects the fact that much of floorspace is old floorspace which would trade at a far lower turnover ratio than new modern format stores. The general average would be expected to be of the order of €12,000 per m² of net floorspace.
- 5.15 The turnover ratio for the 3,410m² of comparison floorspace in the catchment area is €792 per m². This is extremely low and reflects the poor quality of the comparison retail offer in the catchment area. In larger centres it would be reasonable to expect turnover ratios of €3,000 to €5,000 per m², depending on the nature of the comparison floorspace.

6 CAPACITY ASSESSMENT

- 6.1 A capacity assessment provides an indication of the broad requirement for additional retail floorspace in a catchment area. It is based on the growth in expenditure and turnover estimates over the period of the emerging Kells Development Plan and looking forward to the next plan – 2013 to 2020. The assessment takes account of any new developments under construction, growth in turnover efficiency and the extent of any overtrading found for the existing floorspace.
- 6.2 It is important to note that the assessed capacity is not set down as a cap on what quantum of floorspace can or should be developed within a particular county or catchment area. On assessing any planning application the key issue is impact on turnover and hence the viability of a centre or store.

GROSS ADDITIONAL EXPENDITURE POTENTIAL

- 6.3 Table 6.1 takes the information derived in Table 5.3 and presents the projected growth in expenditure between 2007 – 2013.

Table 6.1 Total Expenditure Estimates for Kells Catchment Area Residents (€m, 2002 prices)				
	Convenience		Comparison	
Period	Low	High	Low	High
2007-2013	19.2	31.1	10.1	14.5
2013-2019	11.5	31.9	6.2	14.6
2006-2020	39.5	78.2	17.8	32.8

Source: DTZ Piedad Consulting, 2006

FUTURE SOURCES OF RETAIL SALES

- 6.4 The spare expenditure capacity figures estimated for the catchment area up to 2013 are gross estimates and need to be adjusted to take account of expenditure that may occur via new retail developments that are due to come on stream and through increases in turnover efficiency.
- 6.5 In considering **new convenience retail outlets** that are planned for the period to 2013, the threshold of what should be taken into account is informed by that set under the assessment criteria for large retail developments in the County Retail Strategy. This is 500m² gross and 1,000m² gross for convenience and comparison

floorspace respectively. Information provided by the Council identified that there is just one emerging convenience development which is above this threshold and no comparison floorspace proposals of this order.

- 6.6 The only convenience floorspace that is above this threshold is the SuperValu development which comprises some 1,388m² of net convenience floorspace. The development increases the net convenience floorspace of the existing store by 1,220m². It also comprises four additional retail units with a total net floorspace of 451m² which replace existing units and result in a net additional floorspace of 187m². It is assumed that these units will largely be service/top up convenience in nature and thus the 187m² has been included with the supermarket figure to give net additional convenience floorspace in the catchment area of 1,407m².
- 6.7 With respect to turnover efficiency, we normally only take this into account for comparison floorspace and thus it is not applicable to the emerging scheme.

INDICATIVE FLOORSPACE POTENTIAL

- 6.8 By applying estimated turnover ratios to the estimated gross spare expenditure capacity presented in Table 6.2, we calculate the estimated retail floorspace potential. This assumes that:
- i. New convenience floorspace trades at €12,500/m², which is the estimated turnover ratio for other convenience floorspace that has been derived from our work on county retail strategies and consultations with the industry, expressed in 2002 prices; and
 - ii. New comparison floorspace will be for mid to low order comparison goods and trade at an estimated turnover ratio of €6,600/m².
- 6.9 The conclusions of our assessment derive the indicative floorspace capacity to 2013, to 2019 and 2020. These results are set out in Table 6.2.

Table 9.2 Indicative Floorspace Capacity in Kells Catchment (m²)				
Period	Convenience		Comparison	
	Low	High	Low	High
2007-2013	1,534	2,487	1,529	2,195
2013-2019	919	2,556	944	2,206
2006-2020	3,161	6,255	2,696	4,970

Source: DTZ Piedad Consulting, 2006

- 6.10 Based on the population and per capita expenditure growth assumed above, there is scope for an additional 1,534m² – 2,487m² (net) of convenience floorspace and 1,529m² – 2,195m² (net) of comparison floorspace in the Kells catchment area to 2013. To put this into context, the existing net convenience and comparison floorspace of Kells, including the SuperValu scheme, is 3,218m² and 3,410m² respectively – a total of 6,628m² which when vacant floorspace is added increases to 6,904m². The high growth expenditure capacity potential has the scope for increasing the total floorspace by 4,682m² to 11,586m² by 2013 and this is replicated for the next plan period of 2013 – 2019 providing for a total of 16,346m².
- 6.11 The potential for additional retail floorspace is significant in the context of Kells existing floorspace. However, founded on our comparative analysis of Kells against the other GDA Sub-County Town Centres, it is well below the totals that they are anticipated to achieve by 2013.
- 6.12 It should be highlighted that the capacity assessment, in line with the RPG, is solely concerned with floorspace that retails convenience and comparison goods – it does not encompass non retail services which do not come under the definition of retail floorspace such as hairdressers, professional services, dry cleaners and video rental stores. The scope and potential for these is additional to the expenditure capacity for additional retail floorspace.

CONCLUSIONS

- 6.13 The capacity assessment has been taken to 2013 and 2020, which represent the timescale of the emerging Kells Development Plan and that of the next plan. The inclusion of the latter assessment reflects the need to take a longer term view of the potential of the town to ensure that its emerging potential is fully embraced. It represents a broad assessment of the potential for additional retail floorspace and is not set to provide a cap on what should be permissible which is in accord with the advice set out in the RPG, the GDA Retail Strategy and the County Retail Strategy and we examine this further in the following section – our conclusions and recommendations.

7 CONCLUSIONS & RECOMMENDATIONS

7.1 The foregoing sections have provided the baseline and analysis on which to found the retail planning objectives and policies in the emerging Kells LAP specifically in respect of the following:

- i. Confirmation or otherwise whether the County Retail Strategy defined Core Retail Area and Town Centre Area remain appropriate;
- ii. Provision of strategic guidance on the location and scale of any new retail development in Kells; and
- iii. The broad assessment of the expenditure capacity for additional retail floorspace in Kells and its catchment area.

7.2 In setting the framework for our recommendations on these key policy areas, below we summarise the key findings from the baseline research and analysis:

- National and regional policy support for the development of Kells as a growing urban centre has greatly been strengthened since the publication of the County Retail Strategy through its designations as an *'Urban Strengthening Opportunity'* in the NSS and a *Moderate Growth Town in the Hinterland Area* and part of the Navan – Kells – Trim *Primary Development Cluster* in the RPGGDA. These designations recognise and provide the policy framework for Kells to grow at a faster pace than has previously prevailed and this has consequences for its retail potential and meeting local needs in a way which is *'efficient, equitable and sustainable'*. The scope and potential for this is further enhanced through the emerging improvements to the town's strategic accessibility and connectivity under Transport 21.
- Kells and Environs' population grew by some 25% between 1996 – 2002. This was a dramatic increase based on previous trends – well above national and regional trends and above those for the County as a whole. It reflects the growing influence of the Dublin conurbation on the town. From counts taken of new housing development in the town and environs since 2002, this trend has found to have not only been sustained but increased with the population estimated to have grown by a further 35% in the interim period. Extant planning permissions which are in the pipeline indicate that this pattern is set to continue for the foreseeable future and in fact there is potential that the increases will further accelerate given the strategic roads and transportation infrastructure which are being delivered which will substantially enhance the accessibility and connectivity of Kells within the GDA.
- Population projections for the defined retail catchment area of the town, which is derived from assessments of the attraction of Kells' existing retail offer, indicate that by 2013 – based on the high growth scenario which given recent trends is the most likely scenario – the 2006 population of the catchment area (16,339) will increase to 24,351 which is the review date of the emerging CDP and Kells Development Plan. By 2020, the timescale of the NSS, the population under high growth scenarios is projected to be 37,608 and indicative of Kells achieving its strategic objectives under the NSS and RPGGDA.

- While there is new retail investment in and around the town centre, the health check has illustrated that Kells as a centre has witnessed considerable decline since the 2000/2001 GDA Retail Strategy floorspace surveys were conducted and the 2003 County Retail Strategy was prepared. This is illustrated in particular by the increasing level of vacant retail floorspace within the town centre in the interim period – the number of vacant units has increased from 2 to 21.
- For a centre of its size and importance, Kells is underperforming and this is well demonstrated when its existing offer and scale of emerging new floorspace is compared with the performance of the other Hinterland Area Sub-County Town Centres in the GDA retail hierarchy. As a consequence, local people are having to travel to higher order centres to meet the majority of their main shopping needs – there are therefore high levels of both convenience and comparison expenditure leakage from the catchment area. The new SuperValu will help redress this to a degree in respect of convenience market share but it will not redress the prevailing issues on high comparison expenditure leakage.
- Kells is a town of strategic importance in the County Retail Hierarchy. It is also of great significance in the heritage and history of the County and the country as a whole. The lack of new investment to date within the town centre has importantly meant that the historic street network and the traditional shop frontages have remained largely intact and provide an important foundation for the town to retain its uniqueness and character. However, for this to be achieved requires that any new retail schemes of the quantum and quality required for Kells to sustain and enhance its Sub-County Town Centre role need to provide a catalyst for the regeneration of the town centre which builds on:
 - Integration/strong linkage between new schemes and the traditional heart of the town centre
 - Balancing investment in the town centre, particularly in respect of the public realm and interpretation/promotion of Kells unique heritage and importance.

Failure to squarely address these issues will fuel displacement of retail and other commercial activity from the Core Retail Area/wider town centre and, more than likely, further accelerate the decline of the traditional heart of the town.

7.3 The above analysis and findings clearly have implications on the appropriateness or otherwise of the current definition of the Core Retail Area and Town Centre; the location and scale of new retail floorspace in the town; and, what potential Kells and its catchment area has for additional retail floorspace. In the paragraphs that follow, we examine and provide our recommendations on each but in reverse order as essentially meeting the retail potential and needs of Kells as a Sub-County Town informs the approach to the retail land use and policy framework which requires to be adopted.

ADDRESSING STRATEGIC RETAIL NEED

- 7.4 The broad assessment of the requirement for additional retail floorspace in Kells and its catchment area is set out in Table 7.1.

Table 7.1 Indicative Floorspace Capacity in Kells Catchment (m²)				
Period	Convenience		Comparison	
	Low	High	Low	High
2007-2013	1,534	2,487	1,529	2,195
2013-2019	919	2,556	944	2,206
2006-2020	3,161	6,255	2,696	4,970

Source: DTZ Piedad Consulting, 2006

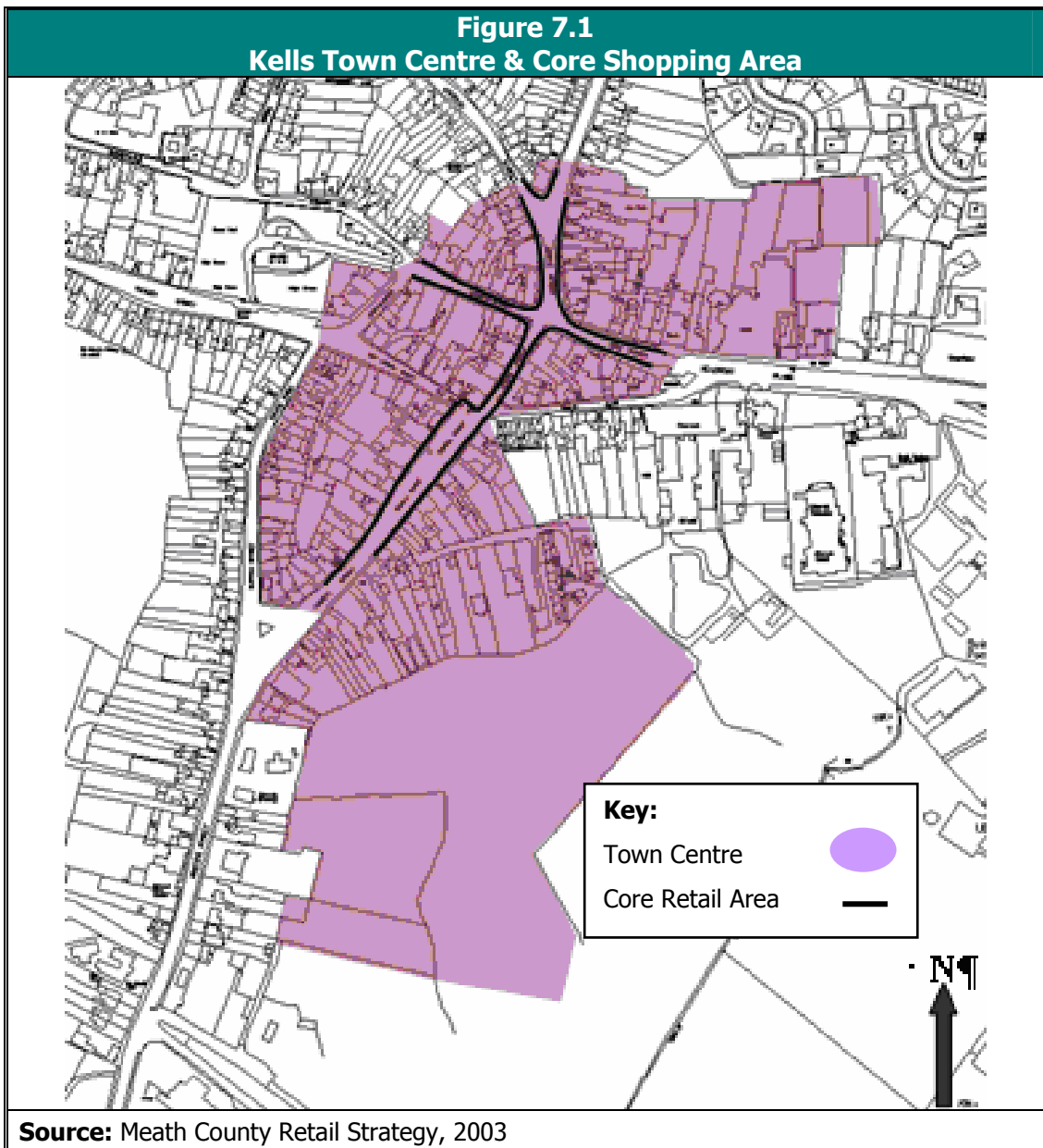
- 7.5 The assessment under the high growth scenario, which is the one that is envisaged to prevail given recent trends and the increased accessibility/connectivity of the town that will be put in place over the timescale of the emerging LAP, provides the potential for Kells total net retail floorspace to grow from 6,904m² at 2006 to 11,586m² by 2013 and to 16,346m² over the next plan period of 2013 – 2019. It represents a significant potential increase over both plan periods based on the current quantum of floorspace.
- 7.6 Looking at the longer term potential of the town is recommended to ensure that the framework for retail and other land use policy and development decisions has a longer term perspective and that those which require to be made in the more immediate future do not prejudice the longer term proper planning and sustainable development of the town and its strategic importance in the County and Region.
- 7.7 The broad assessment of the requirement for additional retail floorspace is not intended to be prescriptive or provide a cap on the scale and nature of retail floorspace which can be sustained, consistent with the RPG, GDA Retail Strategy and the County Retail Strategy, it is provided as guidance. Again, consistent with these national, regional and local retail planning frameworks, it requires to be recognised that different scales and formats of retail development have their own catchment area boundaries. The Kildare Town Factory Outlet Centre, highlighted in Section 4, provides evidence of the case in point. While the baseline catchment area of Kildare Town, based on its existing retail offer may be relatively limited, the emerging development has a catchment well in excess of this extending to the order of some two hours drive time and thus the more local catchment forms only part of the capacity assessment for the development.

- 7.8 As a consequence, the control factor on whether any retail proposal can be accommodated within a specific catchment area is whether it meets the tests set down in the assessment criteria for retail developments in the RPG, GDA Retail Strategy and County Retail Strategy and this is the approach which requires to be reaffirmed in the emerging LAP. The critical issue is not the capacity for new retail development but whether the proposed development is found to have an adverse retail and cumulative impact on the vitality and viability of an existing town centre.
- 7.9 Based on the comparative assessment of Kells against the current and emerging retail offers and potential of the other designated Sub-County Town Centres in the GDA and the County, Kells can be seen as underperforming. It is the smallest of these centres and their environs at 2002 and, given that all – as with Kells – are continuing to grow above national trends, and generally also above regional trends, then it is unlikely to catch up at least over the 2007 – 2013 plan period. Additionally, these, with the exception of Kildare Town, had larger initial retail floorspace baselines and all – including Kildare Town – are anticipated to continue to be larger retail centres than Kells over the foreseeable future. The capacity assessment identifies the potential for Kells achieve parity with the other Sub-County Town Centres and providing the land use and policy framework for this to be achieved should be an important thrust of the emerging LAP.

LOCATION & SCALE OF NEW RETAIL DEVELOPMENT

- 7.10 In accordance with the principles of the Sequential Approach set down in the RPG, GDA Retail Strategy and County Retail Strategy the preferred location for new development is defined as:
- i. The preferred location for new retail development, where practicable and viable, is within a town centre;
 - ii. Where it is not possible to provide the form and scale of development that is required on a site within a town centre then consideration can be given to a site on the edge of the town centre so as to encourage the possibility of one journey serving several purposes. An edge of centre site is taken to be one that is unlikely to be more than 300 – 400 metres from the edge of the prime shopping area, and less in smaller settlements. The distance considered to be convenient will however vary according to local circumstances; and
 - iii. Only having assessed the size, availability, accessibility and feasibility of developing sites and premises, firstly within a town centre and secondly on the edge of a town centre, should alternative out of centre sites be considered where it can be demonstrated that there are no town centre or edge of centre sites which are suitable, viable and available.
- 7.11 In the period to 2013 and beyond, the broad assessment for the requirement for additional floorspace has identified the scope and potential for Kells to witness a significant increase in the quantum of its retail offer. Given the scale and nature of

the requirements of modern format retail operators, it is accepted that generally these cannot be met within the retail footprints which prevail within heritage and traditional town centres such as Kells. This fact was recognised in the County Retail Strategy which identified, in addition to the Core Retail Area, adjacent areas which were appropriate for the potential expansion of the main centres in the County Retail Hierarchy. These, and the adopted Core Retail Area, are illustrated in Figure 7.1.



7.12 In respect of Kells, while the defined area for the expansion of the town centre was substantial in size when set against the extent of the existing town centre, its size and extent was largely founded on the existing performance of the town in terms of both population size and retail attraction. The key issue which this study requires to

advise on is whether both designations are still valid at 2006 or if there requires to be a reappraisal which should be incorporated into the emerging LAP. In this subsection of our conclusions and recommendations, the focus is on the town centre expansion designation as this has consequential implications for the review of the Core Retail Area.

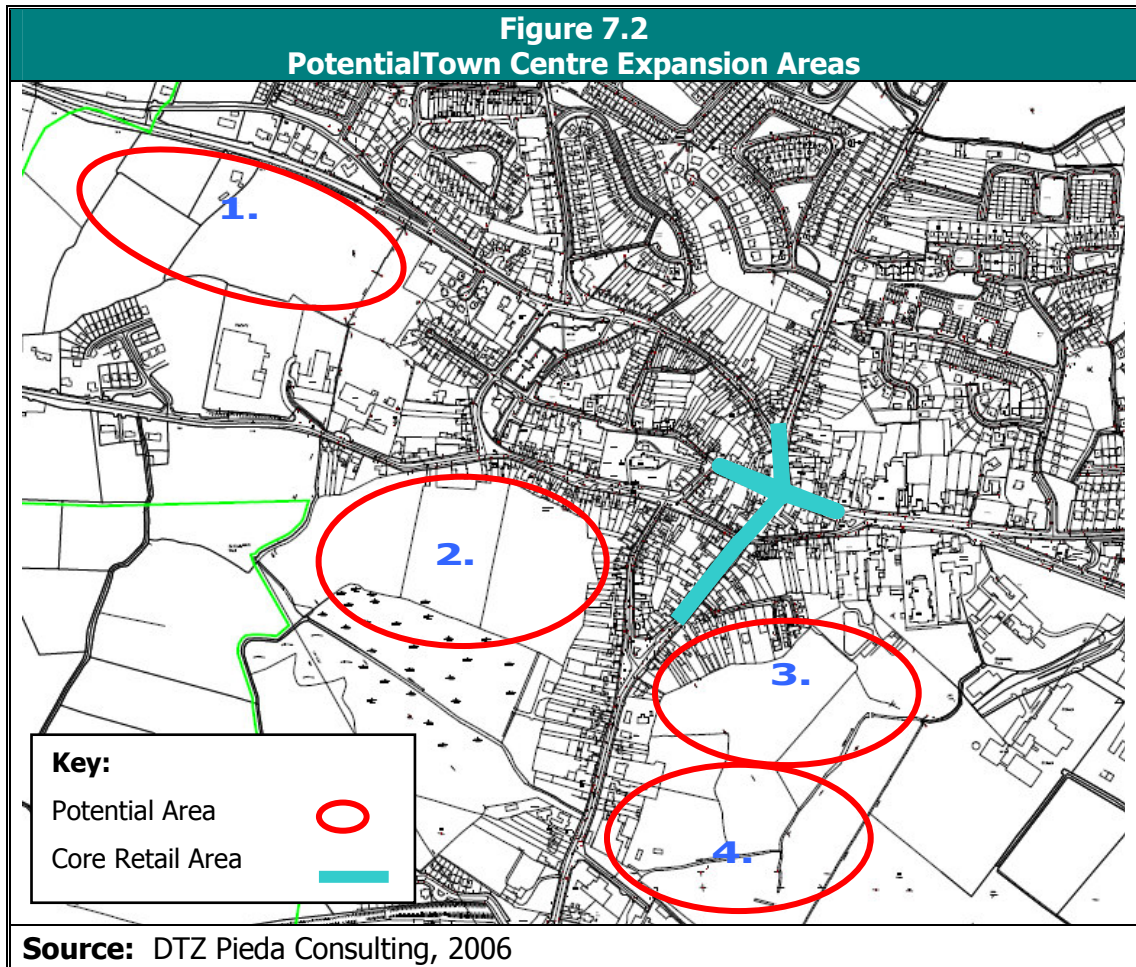
7.13 In examining the appropriateness of the current designated town centre expansion area, the following key influences can be identified and we examine each of these in the paragraphs that follow:

- The Sequential Approach
- The broad assessment of the requirement for additional retail floorspace in the short, medium and longer terms
- The need to ensure that the appropriate land use zonings and policy framework are in place to enable Kells to achieve increasing parity with the other designated Sub-County Town Centres in the GDA and County retail hierarchies.

7.14 **Sequential Approach:** the designated town centre expansion area defined in the County Retail Strategy is wholly in accordance with the principles of the Sequential Approach. It should remain the priority area for the location of major additional retail floorspace in Kells Town Centre.

7.15 **Meeting Need and Market Demand:** the broad assessment of the requirement for additional retail floorspace identifies that in the context of Kells and its catchment area, based on the current offer and attraction of the centre, there is significant potential for new floorspace in the short, medium and longer terms. It is unlikely that this can be met within either the designated Core Retail Area or town centre expansion area although this would require to be justified, in accordance with the assessment criteria for major new floorspace by applicants.

7.16 **Looking to the Future:** considerable emphasis has been made in this report on the need to ensure that the longer term potential of the town is fully embraced to ensure that the framework for retail and other land use policy and development decisions has a longer term perspective and that those which require to be made in the more immediate future do not prejudice the longer term proper planning and sustainable development of the town and its strategic importance in the County and Region. To this end, it is therefore necessary to review the existing and potential expansion town centre expansion options and these are identified in Figure 7.2.



7.17 Below we summarise the key characteristics and potential of the four potential sites/areas identified in Figure 7.2:

- i. **Area 1:** is located along the Oldcastle Road (R163) to the north east of the town centre. A site in this location was rezoned since the adoption of the Kells Development Plan to replace the KS6 objective with 2 land use zoning objectives:
 - E1: 'To provide for industrial and related uses subject to the provision of necessary physical infrastructure', and
 - B5: 'To provide for the development of a retail warehouse park in accordance with approved Action Area Plan and subject to the provision of the necessary physical infrastructure'.
- ii. **Area 2:** is located adjacent to the town centre, west of Suffolk Street and south of Cannon Street with the potential to develop good pedestrian linkages between the two. It has a site area of circa 7.5ha and is currently zoned A2 - Residential;
- iii. **Area 3:** is located to the south east of Farrell Street, adjacent to the area defined as the Core Retail Area and already incorporated in the designated town centre expansion area. It is a site of circa 1.8ha with a C1 – Residential/Business zoning; and

- iv. **Area 4:** is situated south of the town centre, west of Bective Street and represents an extension of the existing town centre expansion area. It has a site area of 3.1ha and a C1 – Residential/Business Zoning.
- 7.18 In the short and medium term, consistent with adopted policy, Area 3 is the one which provides the greatest potential for the regeneration of the town centre and best meets the tests of the Sequential Approach. However, given the increasing pressures for development – predominantly residential – within Kells, there is a risk that the three alternative locations could be lost to alternative uses. Areas 1 and 2 identified do not fall within the remit of the Backlands Area LAP but will be considered by the planning authority as part of the review of the Development Plan. It is the intention of the Council that Area 1, the KS6 lands, would be developed in accordance with the recent variation to the Kells Development Plan which allows for retail warehousing development with a local objective facilitating development of a discount foodstore.
- 7.19 There is an opportunity presented in the Backlands LAP to safeguard available town centre sites for retail development. If retail/town centre uses are to be consolidated in and around the Core Retail Area then the zoning objectives in the emerging Backlands LAP should ensure that retail development and town centre functions are the predominant land use in each of Areas 3 and 4. In this way strategic need/market demand will not have to be met in edge of centre and out of centre locations which would not serve the best interests of the town. Thus we recommend that expansion of the town centre be undertaken on a phased basis with the preferred location for retail development being Area 3 in accordance with the RPG and principles of the Sequential Approach. This noted, it is accepted that certain retail formats may not be able to be accommodated within the town centre or these additional recommended town centre expansion areas due to issues relating to scale, land availability and the viability of the proposed development – the assessment criteria set down in the RPG, GDA Retail Strategy and the County Retail Strategy provide the tests which enable such issues to be addressed without the recourse for any additional edge of centre or out of centre zonings.

DEFINITION OF THE CORE RETAIL AREA

- 7.20 The County Retail Strategy provides a definition of Core Retail Areas informed by the RPG as follows:

'Core Retail Area of a centre is normally defined as the area including and immediate to the 'prime pitch'. This is the area that achieves the highest rentals, best yields, is highest in demand from retailer/operators/developers and investors, is overwhelmingly retail floorspace and has the highest footfall of shoppers.'

7.21 The Core Retail Area is the basis of conducting the Sequential Approach and, thus is critical in the guidance it provides to developers and retailers. Therefore, to ensure that Area 3 is confirmed as the preferred location for the expansion of the town centre then it is recommended that this is communicated in the extension of the Core Retail Area defined in Figure 7.2.

