Cork County Development Plan Review

Population and Housing

Background Document No. 2.

Planning Policy Unit
Cork County Council
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1 Introduction

1.1.1 The Core Strategy, which details the levels of future population and housing growth to be accommodated in the County over the six year life of the County Development Plan, is a key part of the Plan and informs many of the other policies and objectives in the Plan.

1.1.2 Central to the Core Strategy is the issue of population, what level of growth we are planning for and how that growth can be allocated across the county to support the delivery of sustainable communities. This is turn determines the growth in households, the number of new houses required, the amount of zoned and serviced land needed to deliver those houses, and what other additional infrastructure and services are needed to support those communities.

1.1.3 This background document explores these issues. It sets out the historical trends in population, households and housing growth in Cork up to the last Census in 2016. In addition it also sets out the future population of County Cork following on from the targets set out in the National Planning Framework (NPF) and Regional Spatial and Economic Strategy (RSES) looking to the horizon years of 2026, 2031 and ultimately to 2040. It also sets out the reasoning behind the assumptions taken by the local authority in the determination of household size in particular as the latter has an important bearing on the housing unit requirement for a given horizon year. Finally the document looks at the availability of zoned and serviced land for housing.

1.1.4 The assumptions set out in this paper in relation to issues like household size and vacancy will ultimately feed into the preparation of the Draft Cork County Development Plan, primarily for the Core Strategy, Housing Strategy and the HNDA (Housing Needs Demand Assessment).

1.1.5 It is also important to acknowledge that on the 31st of May, 2019 the boundary of County Cork changed bringing with it all of the associated rearrangements of Municipal Districts and Local Electoral Areas following the provisions of the Local Government Act, 2019 and the Local Electoral Area Boundary Committee No. 1 Report 2018. A list of the settlements in each Municipal District within the new revised boundary area is included in Appendix A of this document. Where Census Data is used for tables and graphs in this document – these will generally refer to the old boundaries – i.e. the boundaries that were in effect during the last census (2016). Where information relates to new future population targets the new boundaries are used.

2 Population

2.1 Population Change Nationally

2.1.1 Census 2016 results show that Ireland's population increased by 173,613 persons over the five years since April 2011, to reach 4,761,865 persons in April 2016. This represents a total increase of 3.8% over the 5 years, or 0.8% on an annual average basis. This compares with an annual average increase of 1.6% over the previous inter-censal period 2006 to 2011. Population change is driven by three elements - births, deaths and net migration (immigration less emigration).

2.1.2 Births less deaths is known as natural increase. During the most recent inter-censal period 2011 to 2016 natural increase has continued to be the main driver of population growth in Ireland.

2.1.3 Nationally, the total number of urban centres (those with a population of over 1,500 or greater) increased from 197 in 2011 to 200 in 2016. Small towns with population between 3,000 and 4,999 people were the fastest growing category, increasing their population by 11% since 2011 and by 22.4% since 2006.

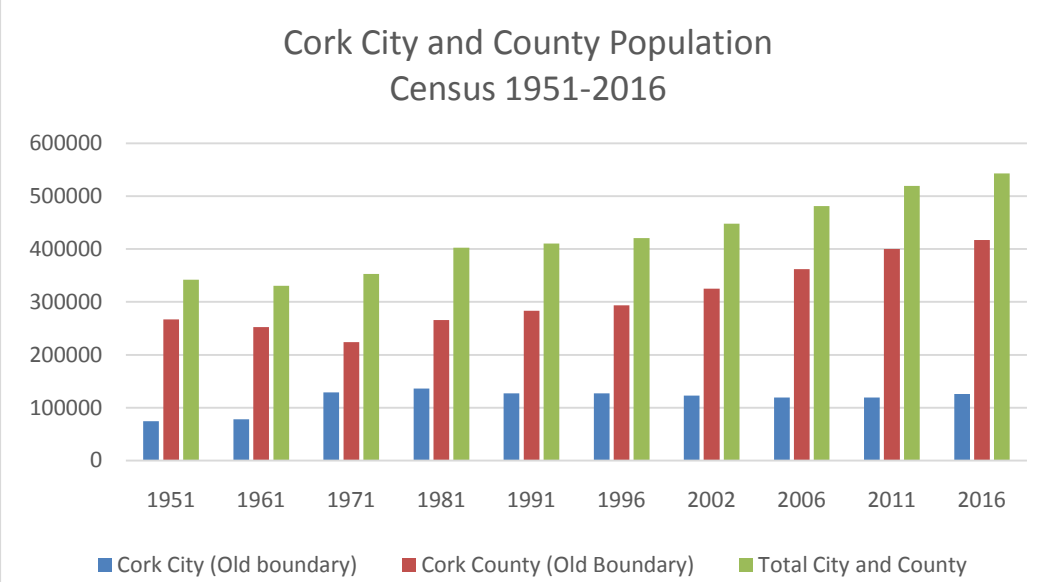
2.2 Net migration

2.2.1 Net migration is derived as a residual of total population change less natural increase. Of the three factors that determine population change (births, deaths and net migration), from an Irish perspective net migration is by far the most influential, volatile and uncertain.

2.2.2 With a recorded natural increase of 196,100 over the period 2011-2016, total net migration is estimated at -22,500 (net outward flow). This is the first inter-censal period (2011-2016) of net outward migration since the 1986-1991 period and contrasts sharply with a net inflow of 115,800 during the previous inter-censal period of 2006 and 2011.

2.3 Cork

2.3.1 The 2016 Census population data for Cork suggests that there is evidence of a continuation of strong growth with an increase of population from 399,802 to 417,211 (17,409) or a 4.3% increase from the 2011 Census. In addition, the data indicates a trend of people returning to live in the City with a 5.4% increase (6,392 people) in population from the previous Census in 2011. The following bar chart highlights the changes in population in both the County and City from 1951 to 2016.



Data Source: www.cso.ie

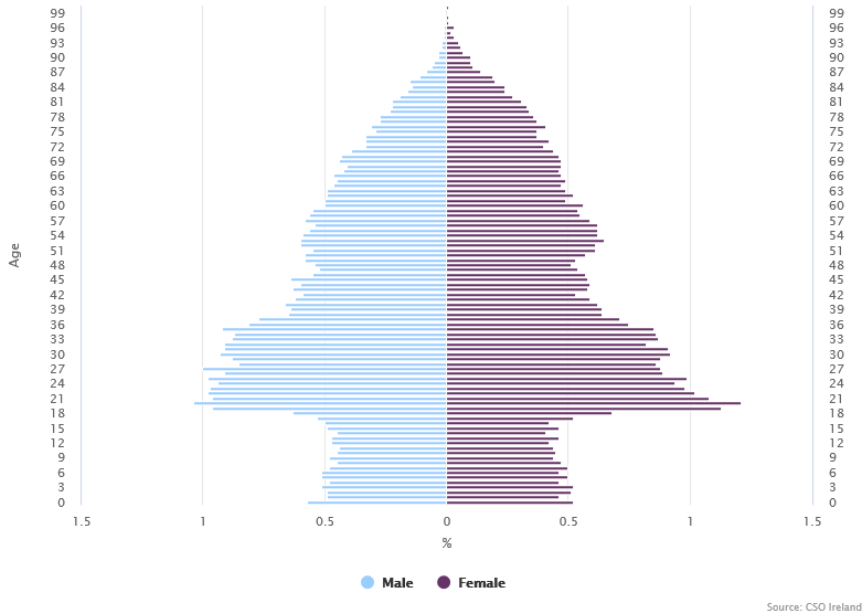
2.4 Cork's Age Structure

2.4.1 The number of males and females in 2016, by single year of age, is represented in the following population pyramids for Cork County, (Cork City is also included for comparative purposes). Despite the fact that the age profile of the new City and County areas will not be fully known until the next census it is nevertheless interesting to note the main similarities and differences in the age profiles of each former local authority area.

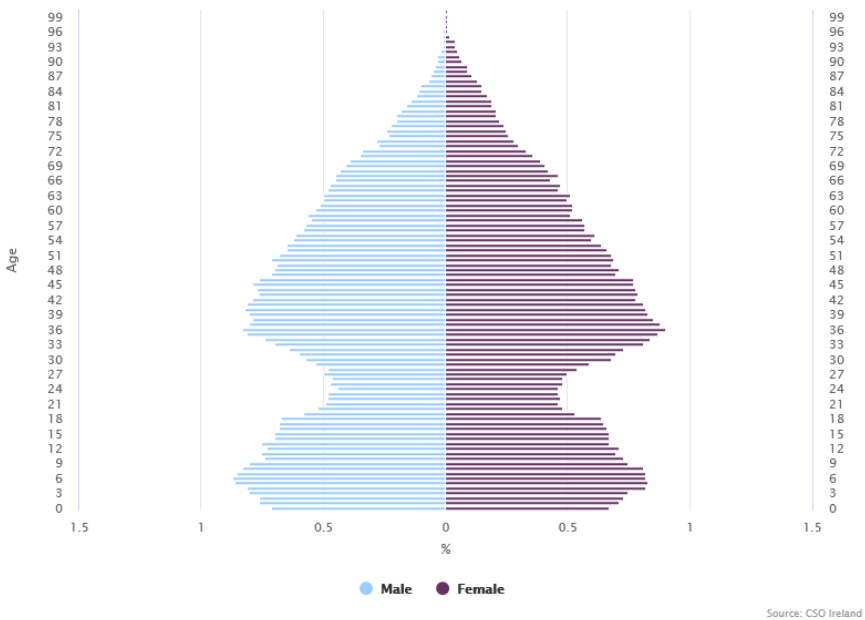
2.4.2 Firstly, it is evident that there are slightly more births recorded in Cork County than Cork City. It is also interesting that from the preschool years right up to the secondary school stage (13-18 year olds) the population in the City fell by 5.1 % (402) over the period 2011-2016. In Cork County there is a definite increase in the years 3-9 which taper back to the birth rate by age 18, indicating a previous baby boom.

2.4.3 Aside from the birth-rate, the next most obvious difference between the two areas is evident in the young adult population (19-24 year olds) where internal migration among this young, (mainly student), population would be an obvious contributor marking an increase in both male and female population (slightly more females) in the college years 18+. The influx of the student population attending NUI - Cork / CIT is more a regional dynamic rather than a County – City one per say.

2.4.4 Both County and City have a more typical pyramid shape from mid-30's in the County and early-50's in the City which tapers out as expected especially over 80 years of age – with slightly more females showing at the tip of the pyramid in both areas.



Cork City



Cork County

Data Source: www.cso.ie

2.5 Population Targets for Cork - 2040

2.5.1 The National Planning Framework Project Ireland 2040 makes provision for the population of Cork City and County to grow to about 770,000 by 2040. The Regional Spatial and Economic Strategy including the MASP also includes population targets to 2026 and 2031. The population of the Cork County is also predicted to grow by nearly 105,000 people to about 437,000 people.

Table 2.1: Summary of the growth planned for Cork to 2040

	Population based on Census 2016*	Population Target 2026	Population Target 2031	Population Target 2040	2016- 2040 Population Increase
County Metropolitan	94,553	114,553	124,553	144,026	49,473
Remainder of County	237,462	262,463	273,462	292,462	55,000
Total County	**332,015**	**377,016**	**398,015**	**436,488**	**104,473**
Cork City	210,853	261,853	286,178	333,000	122,147
Total Cork City & County	**542,868**	**638,868**	**684,193**	**769,488**	**226,620**

Source: www.southernassembly.ie and CCC breakdown of County Metro Population in 2016

2.6 Growth Rates required to achieve this growth

2.6.1 In order to determine what this growth means for County Cork it is interesting to explore the average annual growth rate which would be required in order to achieve these population targets.

2.6.2 Firstly, a historical analysis of growth rates in Cork show that the average growth rate in Cork County over a 10, 20, 35 and 65 year period is **1.3%.** It is important to bear in mind that this data relates to the City and County boundaries from 1951 which includes two boundary extensions. The first in 1955 and the second in 1965 when areas like Model Farm Road, Fairhill, Ballyvolane, Glasheen, Wilton, Ballinlough and Blackrock village all became part of the extended city.

Table 2.2 : Average Annual Rate of Population Change in Cork City, Cork County and Combined Cork					
	10 year	20 year	35 year	65 year	Average
	Average Annual Rate of change 2006-2016	Average Annual rate of change 1996-2016	Average Annual rate of change 1981-2016	Average Annual rate of change 1951-2016	
Cork City	0.51%	-0.06%	-0.23%	0.81%	0.26%
Total Cork County	**1.43%**	**1.78%**	**1.30%**	**0.69%**	**1.30%**
Total City and County	1.21%	1.29%	0.86%	0.71%	1.02%
					CCC calculations based on data from www.cso.ie

2.6.3 What is clear is that Cork County has performed exceptionally well with growth rates of **1.43%** (10 year average annual rate from 2006-2016) and **1.78%** over the 20 years from 1996-2016.

2.6.4 Looking to the future then firstly, to 2026, over the 10 year period from the last census in 2016, growth of additional 45,000 people in Cork County would require a growth rate of 1.28% per annum. The table below also outlines the growth rates for 2031 (1.21%) and 2040 (1.15%).

2.6.5 Based on past performance these targets seem wholly achievable. Also noteworthy is the average Irish growth rate of 1.1% (2017) which is nearly four times the average annual rate of growth in Europe at 0.3% (2017). While this performance was based on the "old" county boundaries which included large areas within the city suburbs, it is considered reasonable to expect that the future rates of growth within the new county area can be achieved in the period to 2040, provided they are supported with the necessary investment in infrastructure needed to facilitate development.

Table 2.3: Annual Average Growth Rates to achieve Population Targets				
	Population Target	Population Growth	Average Annual Growth Required	Years
2026 Population Cork County	377,016	45,000	1.28%	2016-2026
2031 Population Cork County	398,941	66,000	1.21%	2016-2031
2040 Population Cork County	436,488	104,473	1.15%	2016-2040
Average rate of growth (National) CSO 2017	--	--	1.10%	--
Average rate of growth (Europe) CSO 2017	--	--	0.30%	--
				Own calculations based on data from www.southernassembly.ie

2.7 Core Strategy

2.7.1 The Core Strategy of the Cork County Development Plan allocates population and housing growth across the towns, villages and rural parts of the county. The current allocation for population growth for each Strategic Planning Area, as provided for by the County Development Plan 2014, and adjusted to take account of the boundary changes[1], is set out in Table 2.4 below.

2.7.2 The Core Strategy 2014 was based on 2011 Census figures. The 2016 Census figures have been added to Table 2.4 for comparison. Due to the change in the county / city administrative boundaries within the Metropolitan Cork Strategic Planning Area, a 2022 target figure is not available for the villages and rural areas.

2.7.3 The Core Strategy 2014 which is based on the old County boundary provides for overall county population of about 470,622 people and allocated 45% of the growth to the Metropolitan Cork SPA, 28% to the Greater Cork Ring SPA, 12% to the North Cork SPA and 15% to the West Cork SPA.

2.7.4 The allocation of future growth for County Metropolitan Cork as set out in the NPF and the RSES is 49,000 additional people to 2040 – which is about 47% of the total growth allocated to Cork County. The remainder of this growth – 55,000 people will be divided up between the Greater Cork Ring Strategic Planning Area, the West Strategic Planning Area and the North Strategic Planning Area.

2.7.5 Table 2.4 shows that growth in the villages and rural area of the Greater Cork Ring recorded substantial growth while the towns did not perform as well as expected. Indeed, population levels in the main towns were well below target across all Strategic Planning Areas.

Table 2.4: Core Strategy 2014 by Strategic Planning Area

Strategic Planning Area	2011 Census Pop	2022 Target Pop	2016 Census Pop[2]
Metropolitan Cork (adjusted for new boundaries)			
Main Towns	49,464	76,191	53,904
Villages and Rural	(Not available)	(Not available)	40,649
Total SPA	(Not available)	(Not available)	94,553
Greater Cork Ring			
Main Towns	41,300	54,727	43,010
Villages and Rural	77,118	77,155	81,960
Total SPA	118,418	131,882	124,970
North Cork			
Main Towns	13,039	17,117	13,510
Villages and Rural	37,405	38,895	38,091
Total SPA	50,498	56,012	51,601

[1] See Appendix 1 for the Core Strategy tables from the CDP 2014 for the old administrative boundary
[2] Some of the Census towns which previously combined legal towns and their environs have been newly defined using the standard census town criteria (with the 100 metres proximity rule). For some towns the impact of this has been to lose area and population, compared with previous computations – one such example is Bantry town.

West Cork			
Main Towns	13,894	19,900	13,307
Villages and Rural	46,483	48,937	47,584
Total SPA	60,377	68,837	60,891
Total County			332,015
			Data Source: www.corkcocodevplan.com and www.cso.ie

2.7.6 Table 2.5 illustrates the allocation of housing (new housing units) provided for by the Core Strategy 2014 and the Municipal District Local Area Plans 2017, across the settlement network in each Municipal District (adjusted for new boundary). As shown by Table 2.5, the current Core Strategy has allocated the majority of future growth in housing to the main settlements.

2.7.7 Appendix A of this document details the settlements in each Municipal District. Census population data for 2016 and details of the estimated housing yield for zoned land or the overall scale of new development for the villages are also included in Appendix A where available. Census population data is not available for the smaller settlements.

Table 2.5: Current growth provisions (Housing Units) of CDP / LAP by Municipal District

Municipal District	Main Settlement	Key Village	Village	Village Nuclei	Other Location	Total	Rural houses*
Bandon Kinsale	2,846	778	392	260	0	4,276	250
Carrigaline	3,269	286	97	10	0	3,662	425
Cobh	10,106	608	75	85	0	10,874	560
East Cork	7,248	815	335	64	0	8,462	389
Fermoy	3,111	724	83	116	0	4,034	559
Kanturk Mallow	9,257	768	447	57	0	10,529	872
Macroom	1,534	472	524	665	0	3,195	741
West Cork	5,305	842	672	150	0	6,969	623
Total	42,676	5,293	2,625	1,407	0	52,001	4,419
	76%	9%	5%	2%			8%
							Data Source: PPU, Cork County Council

2.7.8 The Core Strategy for the new Plan will identify how population growth is to be allocated across the settlements and rural areas for each Strategic Planning Area and Municipal Districts. The Planning Authority will prepare a Housing Strategy and Housing Need Demand Assessment early in 2020 to inform the Core Strategy[3].

2.7.9 The Core Strategy will be informed by a range of policy guidance and research including:

[3] The Department is updating the guidelines for the preparation of Development Plans and is preparing new guidelines on Housing Need Demand Assessment which are due to be published before the end of 2019. The review of the County Development will be guided by these guidelines.

- the National Planning Framework and the Regional Spatial and Economic Strategy;
- the Housing Strategy and the Housing Need Demand Assessment;
- the Housing Land Availability Study;
- the availability, across the settlement network, of the infrastructure needed to facilitate development including water services and transportation infrastructure.
- the need to provide for rural housing.
- environmental capacity, and
- other relevant government guidance.

2.7.10 The availability of residentially zoned and serviced land to facilitate development will also be a key consideration for the Core Strategy. Appendix 3 of the National Planning Framework sets out a methodology for a tiered approach to land zoning which differentiates between residentially zoned lands that are immediately available for development and lands that require further investment before development can take place. The Core Strategy will be guided by this methodology.

2.7.11 Analysis discussed in the background documents on Settlements and Placemaking, Water Services and Transport highlight the challenges faced by many of the smaller settlements in terms of to accommodating sustainable growth due to the lack of water services capacity and other factors. The new Core Strategy will need to consider these challenges in allocating future population and housing growth.

2.7.12 A key challenge of the National Planning Framework is the need to support compact growth, renewing and developing existing settlements rather than the continual expansion and sprawl of settlements out into the countryside. The National Policy Objective 3c requires that at least 30% of new homes that are targeted in settlements other than the five Cities and their suburbs, be delivered within their existing built-up footprints including brownfield and greenfield infill.

2.7.13 Key to ensuring the implementation of the Core Strategy will be the identification of the infrastructure needed to facilitate development and the development of a detailed investment programme to secure its delivery. Monitoring of development patterns over the lifetime of the plan is also essential to ensure that development is happening in the right place, in accordance with the Core Strategy. Active Land Management is also essential to ensure that zoned and serviced land is coming forward for development in a timely manner.

2.7.14 Key to determining how many new houses will be needed in the county to cater for the future population is average household size, and this is discussed in the following section.

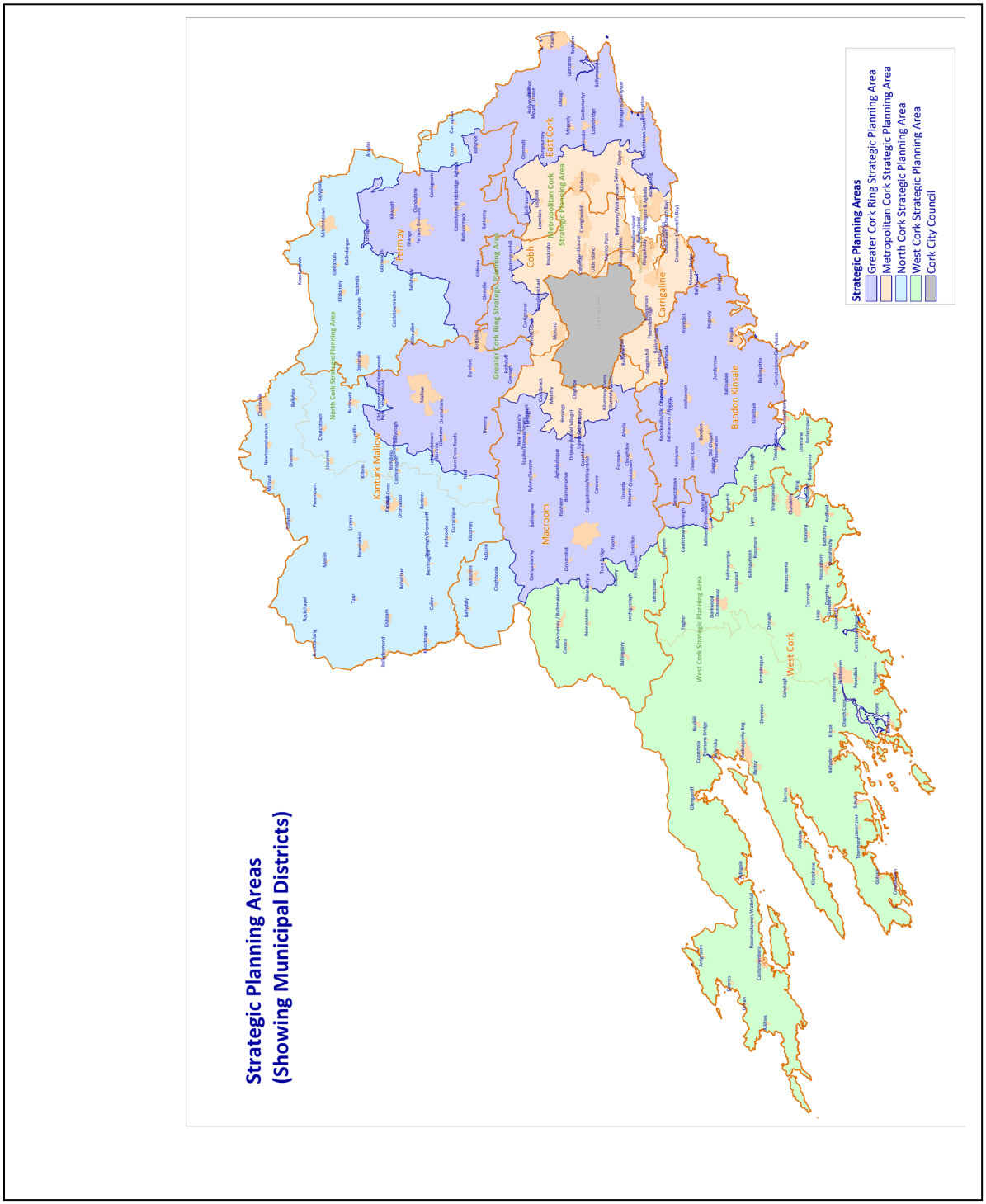


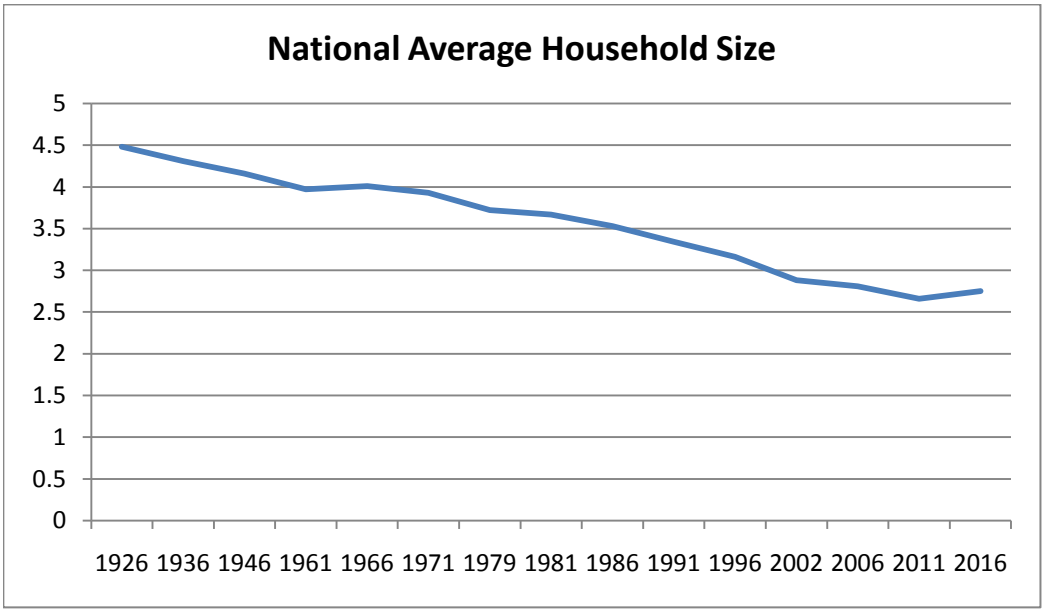
Figure 2.1: County Cork Strategic Planning Areas, showing Municipal Districts

3 Households and Housing Units

3.1 A suggested Approach to Household formation in Cork to 2040

Existing Household Size

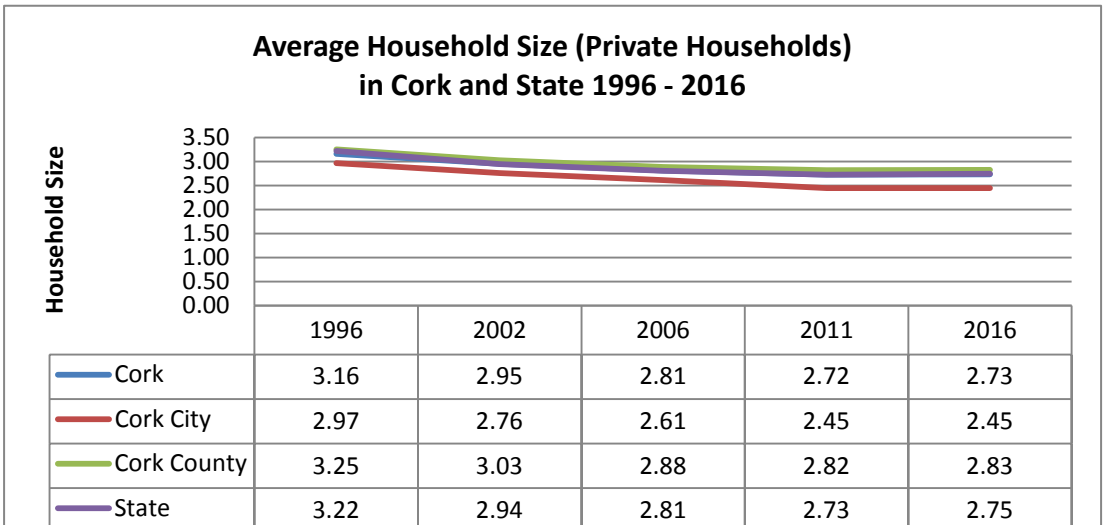
3.1.1 Traditionally, over the last 100 years the average number of people per household has fallen. There are two exceptions to this – the first being in 1961 and the second during the last Census (2016).



Data Source: www.cso.ie

Household Size in Cork

3.1.2 Based on an analysis of Average Household Size (Private Households) in Cork and State from 1996 to 2016 there seem to be similar trends for 'Cork' (i.e. Cork City and County combined) and the State especially in more recent years.



	1996	2002	2006	2011	2016
Cork	3.16	2.95	2.81	2.72	2.73
Cork City	2.97	2.76	2.61	2.45	2.45
Cork County	3.25	3.03	2.88	2.82	2.83
State	3.22	2.94	2.81	2.73	2.75

Data Source: www.cso.ie

3.1.3 In order to determine how average household size in Cork compares with the other Counties, an analysis of Census 2011 and Census 2016 was undertaken. The following table gives a picture of changes in average household size across the country. It is clear that there has been relatively little change overall – however, 3 of the Dublin Authorities (Dublin City, South Dublin and Fingal) and 3 of their neighbouring counties (Laois, Wicklow and Kildare) experienced a 0.1 increase in average household size. This is most probably a result of the housing shortage being experienced nationally but most acutely in the Greater Dublin Area, more young people are staying at home longer and therefore contributing to the increase in average household size.

Table 3.1: Change in Average Household Size across the County – Census 2016 and 2011

County	2011	2016	Change
Cork City	2.4	2.4	0
Dublin City	2.4	2.5	0.1
Leitrim	2.6	2.5	-0.1
Kerry	2.6	2.6	0
Waterford City and County	2.7	2.6	-0.1
Galway City	2.6	2.6	0
Mayo	2.7	2.6	-0.1
Sligo	2.6	2.6	0
Stote	*2.7*	*2.7*	*0*
Dún Laoghaire-Rathdown	2.7	2.7	0
Longford	2.7	2.7	0
Wexford	2.7	2.7	0
Clare	2.7	2.7	0
Limerick City and County	2.7	2.7	0
Tipperary	2.7	2.7	0
Roscommon	2.7	2.7	0

Table 3.1: Change in Average Household Size across the County – Census 2016 and 2011			
Donegal	2.7	2.7	0
Carlow	2.8	2.8	0
Kilkenny	2.8	2.8	0
Louth	2.8	2.8	0
Offaly	2.9	2.8	-0.1
Westmeath	2.8	2.8	0
Cork County	**2.8**	**2.8**	**0**
Galway County	2.8	2.8	0
Cavan	2.8	2.8	0
Monaghan	2.8	2.8	0
Laois	2.8	2.9	0.1
Wicklow	2.8	2.9	0.1
Fingal	2.9	3	0.1
South Dublin	2.9	3	0.1
Kildare	2.9	3	0.1
Meath	3	3	0
			Data Source: www.cso.ie

3.2 Future Household Size

3.2.1 Project Ireland 2040 states that '*currently, 7 out of 10 households in the State consist of three people or less, with an average household size of 2.75 people. This is expected to decline to around **2.5** people per household by **2040***[4]. In Dublin City, one, two and three person households comprise 80 % of all households, yet, the stock of housing in Ireland is largely comprised of detached and semi-detached houses with three to four bedrooms.

3.2.2 Taking the expectation that households are to fall to 2.5 people by 2040 and using an established starting point of the 2016 Census household figures, the following table was prepared taking these two established points, (2016 and 2040) and spreading the difference incrementally over the years to 2040. This gradual decline year on year of 0.95% per annum for ('Cork') and 1.04% for the State over the 2016-2040 period to arrive at 2.5 persons per household (p.p.h.) in 2040. The Cork City and Cork County figures use the same methodology but Cork City, because of its lower starting point at 2.45 (p.p.h.) in 2016 has an end point of 2.22 in 2040.

3.2.3 The actual effect of the boundary change in terms of household size will be seen in the next Census (2021).

[4] Reference page 95 of the Project Ireland 2040 National Planning Framework

Table 3.2: Estimated Incremental Household Size Change in Cork 2016-2040						
Year	**2016**	**2021**	**2026**	**2031**	**2036**	**2040**
Cork	**2.73**	**2.68**	**2.64**	**2.59**	**2.54**	**2.5**
Cork City	2.45	2.4	2.36	2.31	2.26	2.22
Cork County	2.83	2.76	2.69	2.62	2.56	2.5
State	**2.75**	**2.7**	**2.65**	**2.61**	**2.56**	**2.52**
						CCC calculations based on www.npf.ie

3.3 Other important assumptions

Vacancy

3.3.1 In order to estimate the number of housing units required, an additional allowance is made for vacancy and frictional losses in the market. The current County Development Plan 2014 Core Strategy Methodology pointed to the Regional Planning Guidelines (2010) in noting these issues including the downturn in the economy and the re-adjustment of the housing market leading to a houses to household conversion rate of 15%. (This is a reduction on the previous rate which was 30%). Current research and analysis of the housing market would suggest that 10% is a more accurate conversion rate reflecting among other things the emphasis placed on reducing vacancy rates nationally for the forthcoming plan period.

Density

3.3.2 Another factor which influences the amount of land required to achieve the overall population target is density. The requirement for higher density standards and more compact forms of growth in urban and suburban locations is set out in a number of National Government Guidance documents including Guidelines for Planning Authorities on Sustainable Residential Development in Urban Areas (2009), the National Planning Framework 2018 and the Urban Development and Building Height Guidelines (2018).

3.3.3 Background Document No.4 on Settlements and Placemaking deals further with the issue of density and highlights the need to achieve higher densities of development generally across the county and particularly in town centres and along public transport corridors. The document notes there are only two locations in the county with land zoned for high density development (Midleton and Carrigtwohill) and that 72 % of the residentially zoned land in the county is zoned for Medium B density development (12-25 units/ha). The review of the plan will need to consider what mix of land use and range of density is appropriate going forward across all settlements.

3.4 Housing Requirements and Land Availability

3.4.1 The number of new houses required to cater for the future population of the county depends on the assumptions that are made about household size and vacancy. Using a 10% allowance for vacancy and an average household size of 2.5, Table 3.3 below outlines

a need for an additional 61,620 housing units across the county in the period to 2040 in order to cater for population growth of 105,000 persons.

3.4.2 For Cork County this could mean that that up to 18,486 of the total number of 61,620 units required to achieve the population target for Cork to 2040 will need to be provided on lands within their existing built-up footprint of our settlements, including brownfield and greenfield infill sites.

3.4.3 Assumptions made about density will determine how much land is needed to deliver these houses.

3.4.4 A need for 61,620 new housing units has been identified to 2040 with 18,486 of these to be identified within the existing built up footprint of the settlements and the balance of 43,134 to be provided with contiguous to the built footprint. There will be three County Development Plans adopted in the period to 2040 so not all of these houses will be required over the life of the next development Plan which will cover the period 2021 to 2027.

Table 3.3: Cork County Council Overview Population and Housing Units Required in accordance with NPO 3c of the National Planning Framework

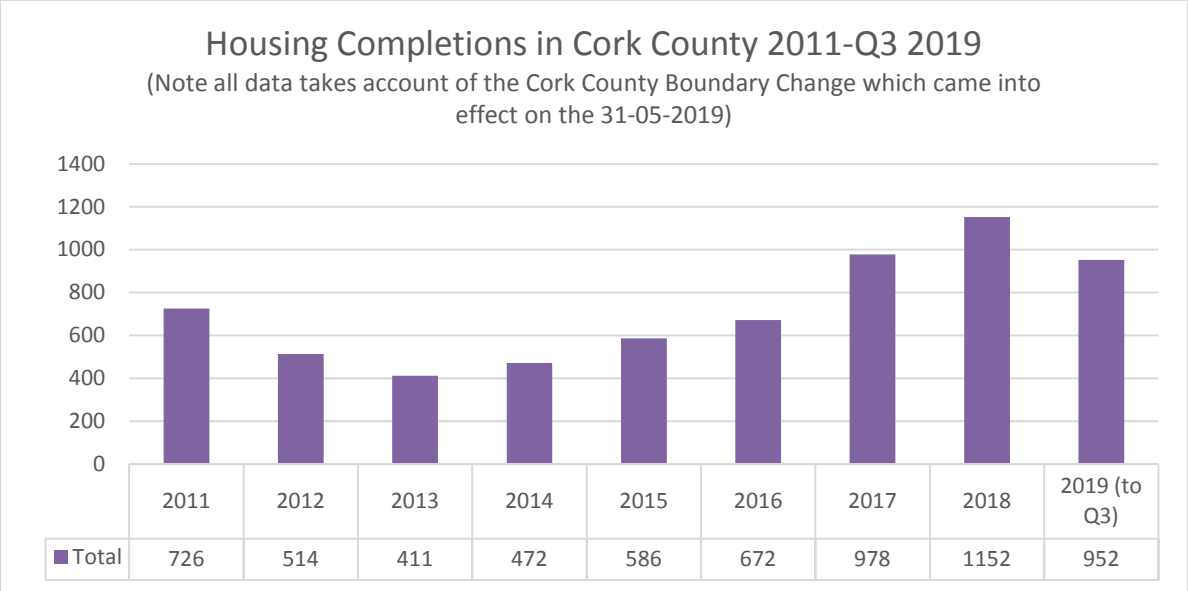
Population 2016	Population 2040	Average Household Size	New Housing Units Required	Greenfield (70%) / Brownfield (30%)
332,000	437,000	2.5	61,620 (2,900 pa)	43,134/18,486

CCC Calculations based on data Source: www.npf.ie and www.southernregionalassembly.ie

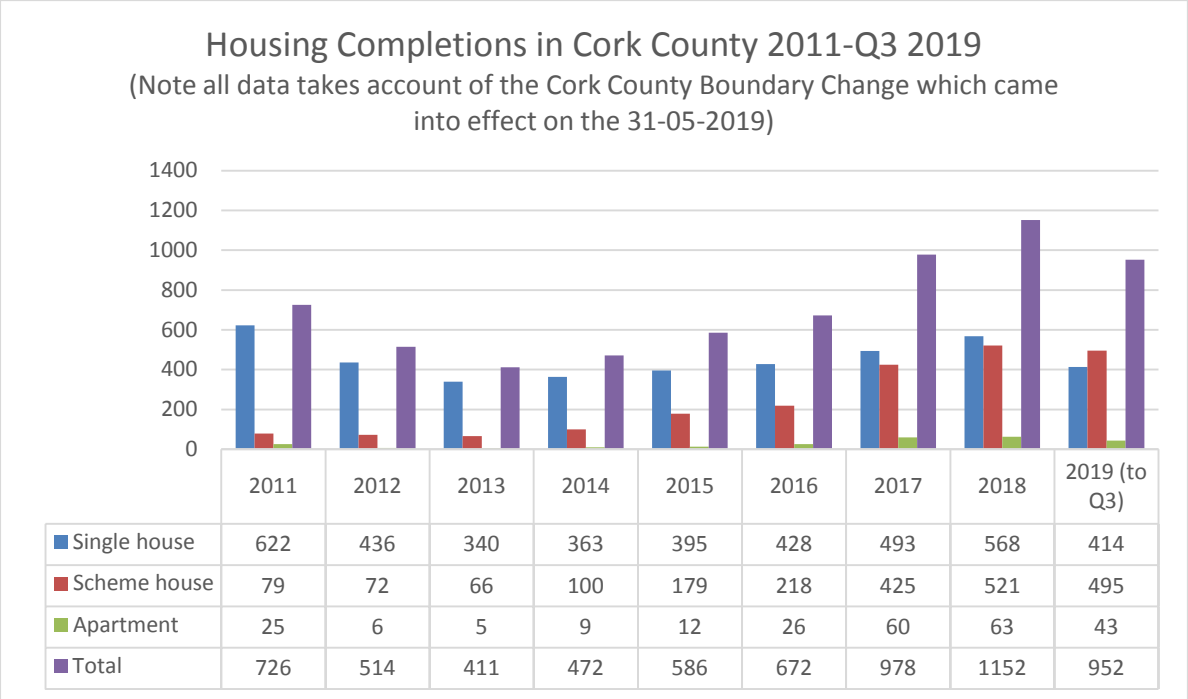
Housing Completions in Cork County

3.4.5 The following graphs set out the housing completions for Cork County from 2011 to Q3 2019. This data takes into account the impact of the boundary change in Cork County which came into effect on the 31st of May, 2019, so that all data of the data within this table for all quarters is now based on these new boundaries.

3.4.6 The first graph provides the overall (total) number of completions while the second graph includes a breakdown by dwelling type (single house, scheme house and apartment). It is clear that from the low point in 2013 (411 units) that there has been a marked and gradual increase in housing completions to last year 2018 (1,155 units). While the single house figures have also increased very gradually during this period, it is interesting to note that the scheme houses figure has increased more markedly doubling output during the period 2016 – to 2017 and with significant increase again in 2018. This trend is set to continue for with the remainder of 2019 continuing at least at a similar pace or exceeding previous years.



Data Source: www.cso.ie



Data Source: www.cso.ie

Draft Housing Land Availability Study (HLAS)

3.4.7 The Council has completed a Draft Housing Land Availability Study. Using the methodology set out in Appendix 3 of the National Planning Framework Plan the zoned land supply across the county has been classified on the basis on whether it falls in Tier 1 or Tier2 from a servicing perspective and assumptions have been made as to how many housing units the

zoned land is likely to yield. The outcome of the study is outlined below.

Tier 1: Serviced Zoned Land

3.4.8 The NPF describes Tier 1 lands as lands that are able to connect to existing development services, i.e. road and footpath access including public lighting, foul sewer drainage, surface water drainage and water supply, for which there is service capacity available, and can therefore accommodate new development. These lands will generally be positioned within the existing built-up footprint of a settlement or contiguous to existing developed lands. Inclusion in Tier 1 will generally require the lands to within the footprint of or spatially sequential within the identified settlement.

3.4.9 The Draft Housing Land Availability Study has estimated that, across the county as a whole, residential zoned lands which are currently able to connect to existing development services can yield c.6,158 residential units. This overall Tier 1 yield is divided between Strategic Planning Areas as follows:

- County Metropolitan Cork – c.3,192 (52%)
- Ring Towns – c.1,505 (24%)
- West – c. 784 (13%)
- North – c. 677 (11%)

Tier 2: Serviceable Zoned Land

3.4.10 This zoning comprises lands that are not currently sufficiently serviced to support new development but have potential to become fully serviced within the life of the plan i.e. the lands are currently constrained due to the need to deliver some or all development services required to support new development, i.e. road or footpath access including lighting, foul sewer drainage, surface water drainage, water supply and/or additional service capacity. These lands may be positioned within the existing built-up footprint of a settlement, or contiguous to existing developed lands or to tier 1 zoned lands, where required to fulfil the spatially sequential approach to the location of the new development within the identified settlement.

3.4.11 For Tier 2 lands the potential for delivery of the required services and/or capacity to support new development must be identified and specific details must be provided at the time of publication of the draft development plan (and the final plan) as part of an infrastructural assessment. This infrastructural assessment must aligned with the investment programme of the relevant delivery agency and must include a reasonable estimate of the full cost of delivery of the required infrastructure to the identified zoned lands.

3.4.12 The Draft Housing Land Availability Study has estimated that, across the county as a whole, residential zoned lands that have the potential to become fully serviced within the life of the plan can yield c.28,369 residential units. This overall Tier 2 yield is divided between Strategic Planning Areas as follows:

- County Metropolitan Cork – c.14,189 (50%)
- Ring Towns – c. 5,101 (18%)
- West – c. 5,307 (19%)
- North – c. 3,772 (13%)

4 Conclusion

4.1.1 Population targets for the County for the period to 2040 are set out in the National Planning Framework (NPF) and Regional Spatial and Economic Strategy (RSES). This background document outlines the historical trends in population and households in Cork up to and including the last Census in 2016 and also looks at the future growth rates required to meet targets set out in the NPF and the RSES. It also sets out the reasoning behind the assumptions taken by the local authority in the determination of vacancy rates and household size in particular as the latter has an important bearing on the housing unit requirement for a given horizon year. These assumptions will be used in formulating the new Core Strategy.

4.1.2 The Council has undertaken a Draft Housing Land Availability Study and will complete a Housing Need Demand Assessment and Housing Strategy in the first half of 2020 to inform the development of the Core Strategy for the new Draft Plan. Guidelines on the preparation of a Housing Need Demand Assessment are awaited.

4.1.3 As outlined in the other background documents accompanying the review of the Plan[5],there are a whole range of other issues that also need to be considered in the preparation of the Core Strategy, including for example, the wider policy and objectives of the National Planning Framework and Regional Spatial Strategy, economic growth trends, the availability of infrastructure to support development, especially the availability of water services and sustainable travel opportunities, density and environmental capacity etc. All of these issues will be considered as part of the preparation of the Draft Plan.

[5] See www.corkcoco.ie for the other background documents on Settlements and Placemaking, Rural Housing, Water Services, Transport etc.

Appendix A: Settlements by Municipal District

Bandon-Kinsale MD			
Settlement Name	**Settlement Type**	**2016 Census Data Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Kinsale	Main Settlement (TC)	5,281	835
Bandon	Main Settlement	6,957	2011
Ballinspittle	Key Village	224	100
Belgooly	Key Village	826	150
Courtmacsherry	Key Village	590	155
Inishannon	Key Village	907	150
Riverstick	Key Village	590	150
Timoleague	Key Village	381	73
Ballinadee	Village	529	34
Ballinhassig	Village	N/A	70
Butlerstown	Village	N/A	15
Clogagh	Village	N/A	7
Crossbarry	Village	368	75
Kilbrittain	Village	216	86
Newcestown	Village	N/A	15
Old Chapel	Village	N/A	80
Ring	Village	N/A	10
Aghyohil	Village Nuclei	N/A	20
Ballincurra / Brinny	Village Nuclei	N/A	5
Ballyfeard	Village Nuclei	N/A	10
Ballyheada	Village Nuclei	N/A	20
Crossmahon	Village Nuclei	N/A	23
Dunderrow	Village Nuclei	N/A	67
Farnivane	Village Nuclei	N/A	5
Gaggan	Village Nuclei	N/A	25
Garrettstown/Garrylucas	Village Nuclei	N/A	20
Knockavilla/ Old Chapel Cross	Village Nuclei	N/A	5
Lislevane	Village Nuclei	N/A	5
Nohoval	Village Nuclei	N/A	39
Tinkers Cross	Village Nuclei	N/A	13
Upton	Village Nuclei	N/A	3

Bandon-Kinsale MD			
Settlement Name	**Settlement Type**	**2016 Census Data Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Ballinglanna	Other Location	N/A	N/A
Ballymartle	Other Location	N/A	N/A
Barrells Cross	Other Location	N/A	N/A
Brownsmills	Other Location	N/A	N/A
Gurranes	Other Location	N/A	N/A
Jagoe's Mill	Other Location	N/A	N/A
Kilcolman	Other Location	N/A	N/A
Kilmacsimon Quay	Other Location	N/A	N/A
Oysterhaven	Other Location	N/A	N/A
Sandycove	Other Location	N/A	N/A
Total MD Population		**37,269**	

East Cork MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Midleton	Main Settlement (TC)	12496	5255
Youghal	Main Settlement (TC)	7963	1993
Castlemartyr	Key Village	1600	235
Cloyne	Key Village	1803	255
Killeagh	Key Village	899	135
Whitegate & Aghada	Key Village/ Specialist Employment Area	2184	190
Ballycotton	Village	497	45
Ballymacoda	Village	185	25
Churchtown South	Village	N/A	15
Dungourney	Village	N/A	10
Ladysbridge	Village	N/A	40
Mogeely	Village	389	80
Saleen	Village	445	50
Shanagarry/ Garryvoe	Village	538	70

East Cork MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Ballincurrig	Village Nuclei	N/A	10
Ballinrostig	Village Nuclei	N/A	5
Ballintotis	Village Nuclei	N/A	5
Ballymackibbot	Village Nuclei	N/A	2
Clonmult	Village Nuclei	N/A	5
Gortaroo (Gortroe)	Village Nuclei	N/A	5
Inch	Village Nuclei	N/A	0
Leamlara	Village Nuclei	N/A	10
Lisgoold	Village Nuclei	N/A	20
Mount Uniacke	Village Nuclei	N/A	2
Barnabrow / Balltmaloe	Other Location	N/A	N/A
Carriganass	Other Location	N/A	N/A
Garryvoe Upper	Other Location	N/A	N/A
Gyleen	Other Location	N/A	N/A
Knockadoon	Other Location	N/A	N/A
Roche's Point	Other Location	N/A	N/A
Trabolgan	Other Location	N/A	N/A
Redbarn	Other Location	N/A	N/A
Total MD Population		**45,441**	

Carrigaline MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Carrigaline	Main Settlement	15,770	2,380
Passage West	Main Settlement	5,843	889
Ringaskiddy	Main Settlement	580	N/A
Crosshaven and Bays	Key Village	2,577	286

Carrigaline MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Ballygarvan	Village	556	45
Halfway	Village	226	10
Minane Bridge	Village	N/A	20
Waterfall	Village	N/A	22
Fivemilebridge	Village Nuclei	N/A	10
Curraghbinny	Other Location	N/A	N/A
Gogginshill	Other Location	N/A	N/A
Killeady	Other Location	N/A	N/A
Roberts Cove	Other Location	N/A	N/A
Tracton	Other Location	N/A	N/A
Total MD Population		**35,141**	

Cobh MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Carrigtwohill	Main Settlement	5,080	3,285
Little Island	Main Settlement	Est 1,335	250
Monard	Main Settlement	0	5,000
Cobh	Main Settlement (TC)	12,800	1,571
Carrignavar	Key Village	519	100
Glounthaune	Key Village	Est 1328	400
Watergrasshill	Key Village	1346	108
Knockraha	Village	371	25
Whitechurch	Village	665	50

Cobh MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Ballymore / Walterstown	Village Nuclei	N/A	5
Caherlag	Village Nuclei	N/A	5
Belvelly	Other Location	N/A	N/A
Bottlehill	Other Location	N/A	N/A
Carrigaloe	Other Location	N/A	N/A
Fota Isalnd	Other Location	N/A	N/A
Haulbowline Island	Other Location	N/A	N/A
Marino Point	Other Location	N/A	N/A
Spike Island	Other Location	N/A	N/A
Templemichael	Other Location	N/A	N/A
Total MD Population		**34,117**	

Fermoy MD			
Settlement Name	Settlement Type	Census 2016 Population	Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)
Mitchelstown	Main Settlement	3,740	1492
Fermoy	Main Settlement (TC)	6,585	1619
Ballyhooly	Key Village	475	50
Castlelyons / Bridebridge	Key Village	374	40
Castletownroche	Key Village	454	54
Conna	Key Village	526	30
Doneraile	Key Village	780	180
Glanworth	Key Village	603	50
Glenville	Key Village	531	100
Kildorrery	Key Village	357	50
Kilworth	Key Village	1055	50
Rathcormack	Key Village	1762	120
Ballindangan	Village	NA	5

Fermoy MD			
Ballynoe	Village	141	20
Bartlemy	Village	N/A	10
Clondulane	Village	417	20
Coolagown	Village	N/A	5
Curraglass	Village	N/A	3
Glennahulla	Village	N/A	5
Killavullen	Village	267	5
Shanballymore	Village	165	10
Aghern	Village Nuclei	N/A	5
Araglin	Village Nuclei	N/A	3
Ballygiblin	Village Nuclei	N/A	4
Curraghalla	Village Nuclei	N/A	5
Grange	Village Nuclei	N/A	5
Kildinan (The Pound)	Village Nuclei	N/A	5
Knockanevin	Village Nuclei	N/A	3
Rockmills	Village Nuclei	N/A	3
Total MD Population		**36,406**	

Kanturk-Mallow MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Buttevant	Main Settlement	970	482
Charleville	Main Settlement	3919	1105
Kanturk	Main Settlement	2350	364
Newmarket	Main Settlement	976	345
Mallow	Main Settlement (TC)	12459	6961
Ballydesmond	Key Village	210	53
Banteer	Key Village	355	200
Boherbue	Key Village	334	150
Dromina	Key Village	275	30
Grenagh	Key Village	579	150
Knocknagree	Key Village	188	30

Kanturk-Mallow MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Milford	Key Village	247	30
Newtownshandrum	Key Village	394	125
Ballyclogh	Village	259	20
Ballyhea	Village	N/A	30
Burnfort	Village	N/A	10
Bweeng	Village	524	10
Castlemagner	Village	281	30
Cecilstown	Village	N/A	10
Churchtown	Village	598	25
Cullen	Village	N/A	25
Derrinagree	Village	N/A	5
Dromahane	Village	959	63
Freemount	Village	159	20
Glantane	Village	N/A	10
Kilbrin	Village	186	20
Kilcorney	Village	N/A	10
Kiskeam	Village	N/A	24
Liscarroll	Village	249	15
Lismire	Village	N/A	30
Lombardstown	Village	N/A	10
Lyre	Village	163	10
Meelin	Village	N/A	20
New Twopothouse	Village	120	10
Rathcoole	Village	224	15
Rockchapel	Village	N/A	15
Tullylease	Village	N/A	10
Ballyhass	Village Nuclei	N/A	5
Curraraigu	Village Nuclei	N/A	5
Dromagh*/ Dromtariff	Village Nuclei	N/A	5
Gortroe	Village Nuclei	N/A	5
Knockaclarig	Village Nuclei	N/A	5
Laharn Cross Rds.	Village Nuclei	N/A	5
Lisgriffin	Village Nuclei	N/A	5
Mourneabbey	Village Nuclei	N/A	5

Kanturk-Mallow MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Nad	Village Nuclei	N/A	2
Old Twopothouse(Hazelwood)	Village Nuclei	N/A	5
Rathduff	Village Nuclei	N/A	5
Taur*	Village Nuclei	N/A	5
Sally's Cross	Other Locations	N/A	N/A
Dromalour	Other Locations	N/A	N/A
Total MD Population		**54,092**	

Macroom MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Millstreet	Main Settlement	1555	350
Macroom	Main Settlement (TC)	3765	1184
Ballingeary	Key Village	235	60
Ballymakeery / Ballyvourney	Key Village	427	45
Coachford	Key Village	408	116
Kilumney/ Ovens	Key Village	1132	251
Aghabullogue	Village	N/A	19
Aherla	Village	N/A	50
Ballydaly	Village	N/A	5
Ballynora	Village	N/A	15
Cloghduv	Village	360	80
Clondrohid	Village	179	20
Courtbrack	Village	194	66
Crookstown	Village	245	40
Inchigeelagh	Village	533	60

Macroom MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Kilmichael	Village	N/A	3
Kilmurry	Village	N/A	15
Kilnamatyra	Village	N/A	20
Model Village (Dripsey)	Village	380	30
Rylane/ Seiscne	Village	N/A	40
Stuake/ Donoughmore	Village	N/A	20
Teerelton	Village	N/A	16
Upper Dripsey	Village	N/A	25
Aubane	Village Nuclei	N/A	5
Ballinagree	Village Nuclei	N/A	15
Bealnamorive	Village Nuclei	N/A	5
Berrings	Village Nuclei	N/A	16
Canovee	Village Nuclei	N/A	3
Carrigadrohid / Killinardish	Village Nuclei	N/A	5
Carriganimmy	Village Nuclei	N/A	5
Cloghboola	Village Nuclei	N/A	5
Cloghroe	Village Nuclei	N/A	10
Coolea	Village Nuclei	N/A	5
Farnanes	Village Nuclei	N/A	5
Firmount	Village Nuclei	N/A	6
Fornaght	Village Nuclei	N/A	9
Johnstown	Village Nuclei	N/A	5
Kilbarry	Village Nuclei	N/A	3
Lissarda	Village Nuclei	N/A	5
Lower Dripsey	Village Nuclei	N/A	5
Matehy	Village Nuclei	N/A	4
New Tipperary	Village Nuclei	N/A	5
Reenanerree	Village Nuclei	N/A	5
Rusheen	Village Nuclei	N/A	5
Tooms	Village Nuclei	N/A	5
Toon Bridge	Village Nuclei	N/A	5
Bealnablath	Other Location	N/A	N/A
Farran / Farran Lower	Other Location	N/A	N/A

Macroom MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Gougane Barra	Other Location	N/A	N/A
Iniscarra	Other Location	N/A	N/A
Srelane Cross	Other Location	N/A	N/A
Total MD Population		**36,844**	

West Cork MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Bantry	Main Settlement	2722	1334
Castletownbere	Main Settlement	860	443
Dunmanway	Main Settlement	1655	569
Schull	Main Settlement	700	174
Clonakilty	Main Settlement (TC)	4592	1596
Skibbereen	Main Settlement (TC)	2778	1189
Ballineen/Enniskeane	Key Village	692	195
Ballydehob	Key Village	274	39
Baltimore	Key Village	323	85
Drimoleague	Key Village	451	137
Durrus	Key Village	305	100
Glengarriff	Key Village	138	60
Leap	Key Village	257	55
Rosscarbery	Key Village	490	91
Union Hall	Key Village	270	80
Bere Island	West Cork Island Communities	167	N/A
Dursey Island	West Cork Island Communities	4	N/A
Heir Island	West Cork Island Communities	24	N/A
Long Island	West Cork Island Communities	20	N/A

West Cork MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Oileán Chleire	West Cork Island Communities	147	N/A
Sherkin Island	West Cork Island Communities	111	N/A
Whiddy Island	West Cork Island Communities	18	N/A
Ahakista	Village	N/A	15
Allihies	Village	N/A	35
Ardfield	Village	N/A	25
Ardgroom* **	Village	N/A	29
Ballinascarthy	Village	N/A	60
Ballingurteen	Village	N/A	30
Ballylickey	Village	N/A	23
Ballynacarriga	Village	N/A	11
Cappeen	Village	N/A	10
Castletown-Kenneigh	Village	N/A	5
Castletownshend	Village	196	70
Crookhaven	Village	N/A	40
Drinagh	Village	N/A	20
Eyeries*	Village	N/A	25
Glandore	Village	N/A	50
Goleen	Village	N/A	40
Kealkill	Village	N/A	60
Kilcrohane	Village	N/A	40
Lissavard	Village	N/A	15
Rathbarry (Castlefreke)	Village	N/A	10
Reenascreena	Village	N/A	5
Rossmore	Village	N/A	14
Shannonvale	Village	N/A	40
Abbeystrowry	Village Nuclei	N/A	6
Adrigole	Village Nuclei	N/A	15
Caheragh	Village Nuclei	N/A	15
Church Cross	Village Nuclei	N/A	7
Connonagh	Village Nuclei	N/A	3
Coomhola	Village Nuclei	N/A	13
Drombeg	Village Nuclei	N/A	4

West Cork MD			
Settlement Name	**Settlement Type**	**Census 2016 Population**	**Net Residential Units Zoned (Main Settlements LAP/TDP) or Overall Scale of New Development (houses)**
Dromore	Village Nuclei	N/A	12
Kilcoe	Village Nuclei	N/A	6
Lowertown	Village Nuclei	N/A	10
Lyre	Village Nuclei	163	8
Murragh	Village Nuclei	N/A	3
Pearson's Bridge	Village Nuclei	N/A	10
Rathmore	Village Nuclei	N/A	5
Rossmackow-en/ Waterfall	Village Nuclei	N/A	10
Togher	Village Nuclei	N/A	10
Toormore	Village Nuclei	182	6
Urhan	Village Nuclei	N/A	7
Ardnageehy	Other Location	N/A	N/A
Barleycove	Other Location	N/A	N/A
Darkwood	Other Location	N/A	N/A
Inchydoney	Other Location	N/A	N/A
Lisbealad	Other Location	N/A	N/A
Ownahinchy	Other Location	N/A	N/A
Poundlick	Other Location	N/A	N/A
Tragumna	Other Location	N/A	N/A
Total MD Population		**52,705**	