

# Study on the Requirement for Retail Outlet Centre(s) in the Cork Metropolitan Area

Draft Final Report



Cork  
County Council  
Comhairle Contae Chorcaí

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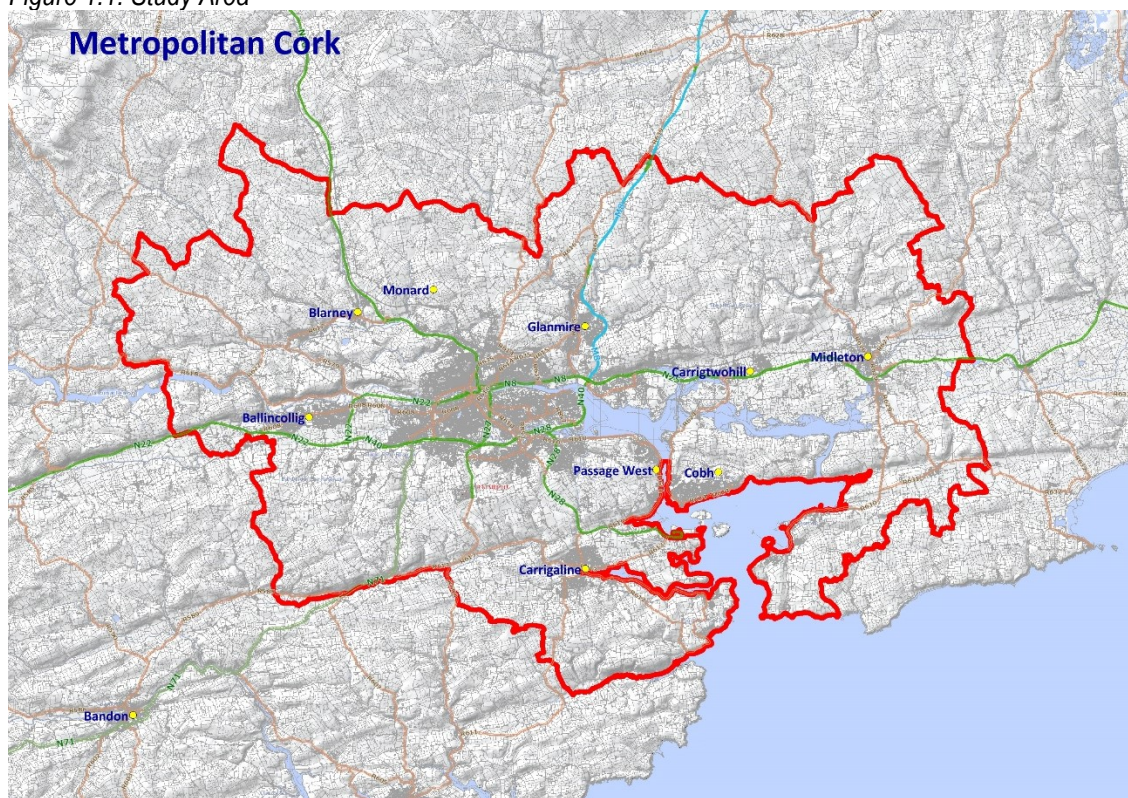
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# 1 Introduction

## 1.1 Background

MacCabe Durney Barnes (MDB) and Transport Insights (TI) were appointed by Cork County and City Councils (the Councils) to prepare a Retail Study on the requirement for a Large Retail Warehouse Development in Metropolitan Cork. The basis of this brief has now been superseded by a requirement instead for a study to consider the need for a Retail Outlet Centre(s) – ROC(s) – in the Cork Metropolitan Strategic Planning Area and Cork City. This is referred to as the Cork Metropolitan Area (CMA) in this study. The study area is outlined in Figure 1.1.

Figure 1.1: Study Area



The brief for the study was agreed following two inception meetings with Cork County Council and Cork City Council in October and November 2018. Following the latter, it was agreed that the study be solely commissioned by Cork County Council (the Council) but with Cork City Council agreeing to provide all background information it held to assist in the preparation of the study.

This Report is a high level strategic assessment of whether or not there is sufficient headroom to support the provision of a retail outlet centre in the Metropolitan Cork Area and if so identify at a strategic level the sub catchment within Metropolitan Cork that is most suitable to accommodate such a facility. As part of this strategic assessment a number of sample potential sites were modelled in order to facilitate the carrying out of the strategic multi-criteria transport and retail assessment necessary to investigate the need and appropriateness of such a development in Metropolitan Cork.

## 1.2 Key Objectives of the Study

In summary, the key objectives of the study were agreed as:

- i) The need and appropriateness for such developments in the CMA – the Study Area, at present taking into account potential city/town impact; and
- ii) If the need is confirmed then to provide quantification of this in both County Cork and the Southern Region and provide proposals for suitable locations within the Study Area for such developments. These were to be founded on a robust selection process which took account of the Metropolitan Cork Joint Retail Strategy 2015 (the Joint Retail Strategy 2015), which was informed by the detail of both the Metropolitan Cork Joint Retail Study and Appendices 2013 (the Joint Retail Strategy 2013) and the requirements of the Guidelines for Planning Authorities – Retail Planning 2012 (GRP 2012).

Additionally, the background to the study highlighted the following:

- The need for additional policy guidance and support for such retail developments was identified during the recent Review of the Municipal District Local Area Plans and during the public consultation on the consequential Variation to *the Cork County Development Plan 2014* (County Development Plan 2014).
- The GRP 2012, prepared by the then Department of Environment, Community and Local Government (now the Department of Housing, Planning and Local Government – DHPLG), sets out the policy with regard to ROC in Section 4.11.4.
- The *Spatial Planning and National Roads Guidelines for Planning Authorities 2012* (SPNRG 2012) provide guidance in Section 2.7 Development at National Road Interchanges or Junctions sets out Transport Infrastructure Ireland (TII) policy with particular regard to development objectives/zoning at locations at or close to junctions where such developments could generate significant additional traffic with potential impact on the national road network.
- The Retail Planning Guidelines (GRP) 2012 provide a framework to guide local authorities in preparing retail strategies for incorporation into development plans.

## 1.3 Principal Issues

The background to the study also identified a number of principal issues which required to be examined. These were as follows:

- i) The catchment area for a ROC could include all of the Southern Region. However, noting this, the study must define the appropriate catchment area in accordance with the GRP 2012; and
- ii) The guidance and key considerations which must be taken into account in respect to ROCs in Section 4.11.4 in the GRP 2012.

All of the above influences and considerations were given weight in the Study Team's response and approach to the Study Brief.

## 1.4 Deliverables

The detailed deliverables from the study were identified as follows:

- Establishing the need or otherwise for the future provision of ROC(s) in the CMA and, if appropriate, setting out the vision for same.
- Assessment of the current level, location and type of ROC provision nationally and identification of whether or not there is a need for the provision of ROC(s) and the preferred location(s) for same within the Study Area. Review of the existing policy approach to ROC and recommendations for a revised policy in the context of the GRP 2012.
- Review of appropriate examples of ROCs elsewhere, including examples outside of Ireland and consideration of the success or otherwise of such centres and their impact on city/town centres.
- Details of the retail catchments covered by the study for a ROC(s), including the basis on which they were decided.
- An assessment of the requirement and timing (e.g. linked to threshold population) of ROC floorspace with regard to projected population growth and consumer spending.
- An assessment of the impact on the vitality and viability of each of main retail centres in the Study Area for a ROC(s), including establishing the potential impact of ROC on existing city/town centres, in particular impact on the higher order comparison shopping (such as fashion outlets) in Cork City Centre, reflecting its role and position in the retail hierarchy, as defined in the Cork Metropolitan Area Joint Retail Study of 2013 and consequent Joint Retail Strategy of 2015.
- A high-level assessment of the role/impact of internet shopping on centres in the CMA.
- Provision of strategic guidance for incorporation into City and County Development Plans on the location and scale of a new ROC(s), if need is demonstrated. The guidance would be incorporated into any updated Joint Retail Strategy that would be prepared in the future.
- Development Assessment criteria for assessing future proposals for ROC developments.
- Consideration of preferred locations in a Traffic and Transportation Assessment for any location identified for a ROC(s).

## 1.5 Overall Approach and Study Methodology

### 1.5.1 Overall Approach to Study

The key stages of the study have been outlined in the Inception Report of November 2018. The approach responds to the outputs required and are informed by the team's knowledge of the Metropolitan Cork Joint Retail Strategy area and experience in working on profile retail formats that have a regional, if not national catchment area. The stages below with the detail of each provided in the paragraphs that follow:

**Stage 1:** Inception (complete)

**Stage 2:** Baseline Review, Potential Location Identification & Interim Report (complete)

**Stage 3:** Retail Impact and Site Assessment and Draft Final Report (this stage)

### 1.5.2 Study Methodology

The study has adopted the following broad methodology:

- A baseline review

- Catchment analysis for a ROC(s)
- Strategic transport impact assessment
- Assessment of need for a ROC
- Strategic location assessment and site selection
- Retail impact and site assessment

### 1.5.3 *Baseline Review*

The baseline review has comprised the following components:

- i) Review of all of the national, regional and local spatial and planning policy frameworks under which the need or otherwise for a ROC(s) in the CMA and wider Southern Region require to be considered and determined;
- ii) Desk-based research/review and data collection and analysis of baseline floorspace information set out in the Joint Retail Strategy founded on delivered planning grants;
- iii) Review of grants across the Study Area that are in the pipeline;
- iv) Review of existing centres within the CMA<sup>1</sup>; and
- v) Review of traffic and transportation baseline information and accessibility potential around the CMA, including a review of the transport network and which also included application for model access to the NTA.

### 1.5.4 *Catchment Analysis*

This section of the report provides an overview of the proposed ROC development and an analysis of its potential customer catchment. The catchment analysis has utilised forecast population data, received from the National Transport Authority (NTA). Such forecast data is consistent with the Draft Regional Spatial and Economic Strategy (RSES) for the Southern Region, and the analysis has been undertaken utilising geographic information systems (GIS) software.

This catchment analysis has allowed for a systematic assessment of potential suitable locations founded on:

- i) Identification of zones, with the high-level division including four areas within the CMA, namely: Cork City; the North East; the South West; and, the North West; and
- ii) Evaluation of potential locations.

### 1.5.5 *Review of Retail Capacity and ROC Need*

A key requirement of the study is to provide a review of examples of ROCs elsewhere, including examples those from beyond the Island of Ireland, and the consideration of the success or otherwise of such centres and their impact on city/town centres. In parallel to this were the requirements for the following:

- i) An assessment of the current level, location and type of ROC provision across the Island of Ireland and identification of whether or not there is a need for the provision of a ROC(s) in the CMA; and

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<sup>1</sup> A comprehensive data base of vacancy levels, yields and pedestrian footfall was not available to undertake a full health check of centres.



- ii) Consideration/assessment of the need for additional comparison retail floorspace in the Study Area, with reference to the findings/recommendations of the CMA Joint Retail Strategy and the undertaking of a retail capacity assessment for the identified catchment.

### 1.5.6 Strategic Transport Impact Assessment

An initial Strategic Transport Assessment for each of the above zones is undertaken involving:

- i) Analysis of the catchment for the ROC, based on an assumed 2:00 hours' drive catchment;
- ii) Development of an appropriate baseline (2018);
- iii) Forecasting future year traffic conditions for the year of opening (2023) and year of opening +15 years (2038), using relevant current TII growth factors;
- iv) Estimation of the proposed development's traffic generation characteristics based on available data from an existing development of comparable type and scale;
- v) Based on potential development of the ROC in each sub-area, analysis of population distribution patterns (location and distance from the centre), and related assignment of development traffic onto the strategic road network in 2023 and 2038 assessment years;
- vi) Determination of the percentage increase in traffic resulting from the proposed ROC development on the strategic road network within the study area for peak network hours on both assessment days (Thursday and Saturday) and both assessment years (2023 and 2038); and
- vii) Consideration of opportunities for the development's access needs to be accommodated by public transport.

### 1.5.7 Assessment of Potential Locations and Site Selection

The study then involves the identification of a potentially suitable locations through the use of multi-criteria analysis. Specific sites were then identified for the purposes of testing the impact of a ROC.

### 1.5.8 Retail and Site Assessment

Each of the sites selected for review were assessed with regard to retail impact, potential for tourism/leisure synergy, traffic and access and public transport accessibility.

## 1.6 Preliminary Consultation

As part of the study to date, the following Preliminary Consultation has taken place:

- Engagement in two meetings with Cork City Council and written invitation to make a submission.
- Both TII and the NTA were written to and informed of the study/project and requested to provide initial advice on potential issues and key considerations. A joint meeting was held to discuss the study.
- The Cork Chamber of Commerce and Business Association and the Chambers of Commerce/Business Associations in all Main Towns in Metropolitan Cork were written to and asked to inform their members of the study/project with each requested to provide initial submissions as to the appropriateness or otherwise of the potential for a Retail Outlet Centre (ROC) or ROCs in the Cork Metropolitan Area.

The written responses are summarised in Appendix I.

## 1.7 Structure of Report

The report is structured as follows:

**Section 1:** Introduction

**Section 2:** Policy Framework

**Section 3:** ROC, Tourism & Online Shopping Review

**Section 4:** Cork Metropolitan Area Transport Network Overview

**Section 5:** Catchment Analysis and Retail Capacity Assessment

**Section 6:** Strategic Transport Impact Assessment

**Section 7:** Strategic Location Assessment and Site Selection

**Section 8:** Site Assessments

**Section 9:** Conclusions of Study

**Section 10:** Vision and Development Assessment Criteria

## 2 Policy Framework

### 2.1 Introduction

This chapter provides a review of all of the national, regional and local spatial and planning policy frameworks under which the need or otherwise for a ROC(s) in the CMA and wider Southern Region requires to be considered and determined. These were as follows:

- i. Project Ireland 2040: National Planning Framework 2018;
- ii. Guidelines for Planning Authorities – Retail Planning 2012;
- iii. South West, Mid West and South East Regional Planning Guidelines 2010;
- iv. Draft Southern Regional Spatial & Economic Strategy including the 3 Metropolitan Area Strategic Plans 2018;
- v. Metropolitan Cork Joint Retail Study and Appendices 2013;
- vi. Metropolitan Area Cork Joint Retail Strategy 2015;
- vii. Cork Area Strategic Plan Update 2008;
- viii. Draft Cork Metropolitan Area Transport Strategy 2019;
- ix. Cork County Development Plan 2014, as varied;
- x. Cork City Development Plan 2015;
- xi. Little Island Traffic & Transportation Study 2018; and
- xii. The Blarney-Macroom; Bandon-Kinsale; Ballincollig-Carrigaline; Cobh; East Cork; Fermoy; Kanturk-Mallow; and, West Cork Municipal District Local Area Plans 2017.

Each is reviewed under the following headings, with the focus being on settlement hierarchy and retail policy and potential:

- National
- Regional
- Sub Regional
- Local

### 2.2 National

#### ***Project Ireland 2040: National Planning Framework 2018***

The National Planning Framework (NPF), in conjunction with the *National Development Plan 2018 – 2027* (NDP), was published in February 2018. It replaces the *National Spatial Strategy 2002 – 2020* (NSS 2002). The NPF sets out the Government's high-level strategic plan for shaping the future growth and development of the country out to 2040. It outlines key principles which regional and county/city level strategies and plans are required to follow in their preparation and implementation.

The NPF reaffirms the regional structure for planning and economic development across the country introduced on 31 January 2015 which reduced the then 8 Regional Authorities and 2 Regional Assemblies to 3, namely the Southern Region (within which the CMA is located), the Eastern and Midlands Region and the Northern and Western Region. The Southern Region now comprises the former South West, Mid West

and South East Regional Assembly areas. It also introduces a new strategy for managing growth over the period to 2040 across the regions.

#### *Targeted Pattern of Growth*

The NPF projects that there will be an additional one million additional people living in Ireland by 2040. **National Policy Objective 1a** seeks that this growth will at least be matched in the Southern Region (and the Northern and Western Regional Assembly area) to that of the Eastern and Midland Regional Assembly area. As the largest centres of population, employment and services outside of the capital city, the four cities of Cork, Galway, Limerick and Waterford are identified as providing a focus for growth in their respective regions, with only Galway being located outside of the Southern Region.

The NPF highlights that this represents a significant change from current trends and that **National Policy Objective 1b** plans for the population of the Southern Region to grow by between 340,000 – 380,000 to a population of almost 2 million.

The NPF forecasts an additional population of 105,000 – 125,000 (and at least 315,000 in total), founded on the housing potential within the Cork City and Suburbs. With regard to Limerick and Waterford, the targets for the two cities and their suburbs are:

- i. **Limerick:** a population increase of 50,000 – 55,000 (at least 145,000 in total); and
- ii. **Waterford:** an increase of 30,000 – 35,000 (at least 85,000 in total).

The existing and targeted patterns of growth in the NPF reflect/reinforce the fact that Cork City is the second City/Metropolitan Area in the country.

#### *Retail Direction & Policy*

The NPF sets out the key future planning and development and place making policies for the Southern Region, which are relevant to the consideration of the potential proposed development as follows:

- Developing and implementing comprehensive and strategic metropolitan area plans for Cork, Limerick and Waterford cities that secure long-term transformational and rejuvenation-focused city development, with city centre areas being the drivers for the wider region. It would be highlighted that retail development and potential are not explicitly highlighted in what this equation should comprise.
- The NPF recognises that Cork already performs as a major urban centre in Ireland and that it has positioned itself as an emerging medium-sized European centre of growth and innovation. It promotes that building on this is critical to enhancing Ireland's metropolitan profile. To achieve this, the NPF states that there requires to be an ambitious vision for Cork. The pillars for this make no reference to the importance of retailing in the overall equation of what this should comprise.
- Although retail development is also not explicitly identified in respect of both the Limerick and Waterford cities and their Metropolitan Areas, implicit in the NPF's vision is the extension of both city centres to areas outside of the traditional city centres., specifically towards Limerick Docklands and Waterford's North Quays.
- Again, while retail development and potential are not explicitly identified/addressed in the NPF, a key emphasis is the principle of ensuring more compact and sustainable forms of development with a key priority being achieving/delivering infill/brownfield development.
- In its review of Healthy Communities, the NPF sets out the following hierarchy and related infrastructure in respect of commercial/retail development in the equation:

- **Smaller Settlements and Rural Areas:** Shop, Pub, Post Office, Petrol Station
- **Smaller Towns and Villages:** Supermarket, Restaurants, Mix of Retail Facilities
- **Large Towns:** Shopping Centres, Retail Warehousing, Range of Restaurants
- **Cities:** Department Stores, Specialist Shops, Arts and Cultural Facilities.

It would be noted and highlighted that the above does not address/examine the retail role and potential of the wider Metropolitan Areas of the country's main cities.

In conclusion, although the NPF provides an ambitious and visionary agenda for Ireland at 2040, retail development and potential are not specifically identified as core to this.

### **Guidelines for Planning Authorities – Retail Planning (2012)**

The GRP were published by the DHPLG in April 2012. They generally reinforce the principles and guidance provided in the 2005 guidelines but introduce a number of new dimensions informed by: the experience from how the previous GRP were implemented/interpreted; a greater understanding of the dynamics of the retail sector and its importance to the economy; and, reinforcing the recognised importance of sustaining the vitality and viability of centres at all levels of the settlement hierarchy. Founded on this, the GRP 2012 advise that:

*'The aim of the Guidelines is to ensure that the planning system continues to play a key role in supporting competitiveness in the retail sector to the benefit of the consumer in accordance with proper planning and sustainable development. In addition, the planning system must promote and support the vitality and viability of city and town centres thereby contributing to a high standard of urban design and encouraging a greater use of sustainable transport.'*

The prescribed retail hierarchy set out in the GRP 2012 is of considerable relevance to the analysis and assessments of this study. This hierarchy sets out that:

- i) **Metropolitan:** Dublin City provides retail functions of a specialist nature not found elsewhere in the State, as well as providing the broadest range of comparison goods shopping. The other large cities of Cork, Limerick, Galway and Waterford provide a range of high-order comparison shopping which is largely unmatched in smaller cities and towns;
- ii) **Regional:** in the Southern Region, Ennis, Kilkenny, Mallow, Tralee/Killarney and Wexford are designated as Hub Towns and Clonmel as a Large Town which perform important regional retailing functions;
- iii) **Sub-Regional:** within the Southern Region, in the GRP hierarchy, these are identified/designated as performing important sub-regional retailing functions and include Carlow, Dungarvan, Enniscorthy, Midleton, Nenagh, New Ross and Thurles;
- iv) **District Centres:** the GRP's Glossary of Terms (Annex 1) describe District Centres as providing a range of retail and non-retail services for the community at a level consistent with the function of the centre in the Core Strategy of individual Development Plans. Within the retail hierarchies of the three Southern Region cities, they may be designated as District Centres but their size, role and function are as Shopping Centres which have appeal beyond their immediate communities/hinterlands;
- v) **Small Towns & Rural Areas:** these prevail in large numbers across the country and a key characteristic of the settlement and retail hierarchies of the Southern Region. The GRP assess that there are some 75 small towns in Ireland which have populations in the range of between 1,500 – 5,000. The guidelines state that these typically provide basic convenience shopping and in some

cases comparison retailing. There are exceptions to this such as Blarney, which: had a population of 2,539 in 2016; is designated as a Metropolitan Town in the CMA; and, significant comparison shopping, albeit this is mainly directed at niche tourism markets; and

- vi) **Local Shopping:** is provided by a mixture of neighbourhood shops in both suburban areas and villages.

### *Key General Principles*

The GRP 2012 set out the following general principles that require to be given weight in the consideration and determination of all retail applications:

- The aim of the guidelines is to ensure that the planning system continues to play a key role in supporting competitiveness in the retail sector for the benefit of the consumer in accordance with proper planning and sustainable development.
- They emphasise that enhancing the vitality and viability of city and town centre in all their functions with sequential development being an overarching objective in retail planning. The guidelines include a presumption against large out of town retail centres, in particular those adjacent or close to existing, new or planned national roads/motorways.
- The guidelines prescribe five key policy objectives, namely:
  - Ensuring that retail development is plan-led.
  - Promoting city/town centre vitality through a sequential approach to development.
  - Securing competitiveness in the retail sector by actively enabling good quality development proposals to come forward in suitable locations.
  - Facilitating a shift towards increased access to retailing by public transport, cycling and walking in accordance with the Smarter Travel Strategy.
  - Delivering quality urban design outcomes.

### *Guidance in Respect of Outlet Centres*

Of critical importance to this study is the GRP 2012 guidance in respect of outlet centres, which is provided under paragraph 4.11.4 of the guidelines as follows:

*‘Outlet centres consist of groups of stores retailing end-of-season or discontinued items at discounted prices and are typically located in out-of-centre locations.*

*The success of these outlet centres depends on attracting customers from a wide catchment area, and from the tourism sector. When they are located out-of-town on greenfield sites, they can divert a significant amount of expenditure on comparison shopping goods away from established city/town centres and tourist centres even some distance away. Nonetheless, outlet centres within or immediately adjacent to a city or town centre can generate commercial synergies with the established retail outlets, thereby raising the profile of the centre and enhancing aggregate turnover on retail goods and leisure activities.*

*Because of the specific niche that outlet centres operate within, applicants must demonstrate, and planning authorities must ensure that the products sold will not be in competition with those currently on sale in typical city/town centre locations.*

*Applications for the development of outlet centres should be considered having regard to the provisions of the development plan/relevant retail strategy and assessed in accordance with the sequential test set out in Chapter 4 (of the GRP 2012).*

*It should be recognised, however, that outlet centres are unlikely to succeed commercially in close proximity to the main urban centres in Ireland because retailers do not normally choose to trade at a large discount in direct competition with their high street outlets. However, experience shows that this constraint is unlikely to arise with smaller or secondary town centres, especially those in areas which attract large numbers of tourists. Consequently, the most appropriate location for outlet centres is likely to be where commercial synergy can be achieved between an outlet centre and an urban centre which would lead to economic benefits for the overall area. Outlet centres should not be permitted in more remote out-of-town locations.'*

As discussed with the Council at the Inception Meetings, the GRP 2012 provide very mixed messages and guidance which essentially are the tests of the study to review and provided evidence-based advice on. This is addressed in the case studies of ROCs around the island of Ireland and the United Kingdom (UK) which are provided later in the report.

### **Spatial Planning and National Roads Guidelines for Planning Authorities (2012)**

Section 2.6 on Exceptional Circumstances considers the possibility for Planning Authorities to identify stretches of national roads where a 'less restrictive' approach may be applied as part of the forward planning process, i.e. through either varying or reviewing a development plan. It considers that in considering whether a development would be exceptional, Planning Authorities should take account of:

- *“the relevance and appropriateness of proposed development in supporting the aims and objectives of the National Spatial Strategy and Regional Planning Guidelines;*
- *the requirements of other planning guidelines issued under section 28 of the Act including the Retail Planning Guidelines (2005), which include a general presumption against large retail centres being located adjacent or close to existing, new or planned national roads, including motorways;*
- *the nature of proposed development and the volume of traffic to be generated by it,*
- *any implications for the safety, capacity and efficient operation of national roads;*
- *any plans for future upgrades of national roads and other transport infrastructure/services;*
- *the suitability of the location compared to alternative locations;*
- *the pattern of existing development in the area;*
- *satisfactory details of the proposed demand management measures;*
- *acceptable funding and delivery proposals for any road improvements required, and,*
- *the precedent that could be created for cumulative development in the area and the potential implications for the national road network.”*

It also sets out criteria for development along lightly trafficked sections of national secondary roads.

Section 2.7 on 'Development at National Road Interchanges and Junction' sets out the policy in relation to development objectives / zoning of location at or close to junctions where such development could generate significant additional traffic with potential impact on the national road network. It considers that development which is considered by a Planning Authority can demonstrate that it will not compromise the capacity or efficiency of the national road or junction, then a number of criteria will have to be met, including:

- *“Demonstration of the need for additional connectivity by reference to policy considerations such as the National Spatial Strategy, Regional Planning Guidelines and in the Greater Dublin Area, the National Transport Authority’s transport strategy.*
- *Consistency between the relevant development plan and the relevant plans and strategies mentioned above;*

- *Early identification, through the plan-making process, of appropriate strategic land uses, which will benefit from high quality access, such as nationally or regionally important employment clusters or intermodal transfer facilities (but excluding retail and residential development);*
- *Demonstration that all other options for servicing the development needs and, in particular, the regional and local roads network and the use of public transport solutions, have been examined and exploited to the fullest extent practicable;*
- *Demonstration that the additional traffic loading can be satisfactorily accommodated at the junction concerned and on the national road network;*
- *Ensuring that the proposed development will not give rise to an undesirable precedent for further traffic generating development at or in the vicinity of the proposed development;*
- *Demonstration that design complies with NRA Design Manual for Roads and Bridges (DMRB) standards;*
- *Satisfactory details of the proposed demand management measures; and*
- *Acceptable funding and delivery proposals for any required improvements.”*

### 2.3 Regional

The former South West Regional Assembly area is now part of the wider Southern Region. Although the *Draft Southern Regional Spatial and Economic Strategy 2018* (DSRSES 2018) has been published and being progressed to finalisation, the brief for the study has required that the potential for a ROC(s) in the previous *Regional Planning Guidelines 2010* (RPG) covering the South West, Mid West and South East RPGs be reviewed.

#### ***South West Regional Planning Guidelines 2010***

The *South West Regional Planning Guidelines 2010* (SWRPG 2010) cover the three local authorities of Cork City and County and County Kerry. For the purposes of the SWRPG 2010, the region is divided into four main planning areas, as follows:

- i. **Greater Cork Area:** comprising the CMA or Gateway and the Ring Towns and Rural Area in the *Cork Area Strategic Plan* (CASP) area;
- ii. **Tralee/Killarney:** Linked Hub area surrounding the functional planning area of the County Kerry hub towns;
- iii. **Northern Area:** which is a combination of the northern parts of counties Cork and Kerry; and
- iv. **Western Area:** this is made up of the combination of the peninsulas of the two counties.

The guidelines state that the South West Region is characterised by its broad diversity of social, cultural, economic, physical and environmental assets. Its inhabitants enjoy an attractive choice of places to live and work ranging from modern urban settings to smaller rural towns & villages or isolated farms in mountain areas and islands.

One of the strategic aims of the guidelines is to encourage the growth of population and employment in the **Cork Gateway** in order to create the necessary critical mass for the Gateway so that it can compete more effectively for investment and growth. Cork City at the heart of the Gateway provides a focus for Gateway growth. The guidelines note that planned growth in Metropolitan Towns is intended to complement growth in the City so that the Gateway can offer a broad choice of locations for sustainable future development. The main Gateway locations (outside Cork City) for future population growth will be in the Metropolitan Towns. These comprise the settlements along the suburban rail corridors including Midleton, Carrigtwohill, Monard, Blarney and Cobh. Additional growth will also be directed to Ballincollig aligned to the development of a high-quality public transportation corridor linking Ballincollig with Mahon and the City Centre as proposed in the *Cork Area Strategic Plan Update 2008* (CASP Update 2008). Within the City, growth will be



focused on brownfield sites such as Docklands and Blackpool as well as suburban areas such as Ballyvollane and Mahon.

**Greater Cork Area** which comprises the Cork Gateway, but also includes the Mallow Hub and a number of other towns designated as the Ring Towns (Fermoy, Youghal, Bandon, Kinsale, Macroom), is the principal economic driver of the overall region. The strategic aim of this planning area is to encourage the growth of population and employment in the Cork Gateway in order to create the necessary critical mass for the Gateway so that it can compete more effectively for investment and growth.

The **Tralee-Killarney Hub Towns** are envisaged to be the focussed engines of growth in County Kerry. The aim is to position the Hub Towns as sufficiently sized urban zones to attract additional employment and population, which will increase their competitiveness and attractiveness as national and regional investment locations.

The Northern and Western Areas are predominantly attractive rural areas of high amenity and cultural value, with many attractive towns and villages, together with strategic assets. The aim of these planning areas, generally, is to maintain the quality of life by encouraging a balance in growth between rural and urban areas. In order to encourage economic growth in these planning areas, the SWRPG 2010 advise it will be necessary to focus on promoting entrepreneurial development throughout the areas. Population growth in these areas will be predominantly employment led.

The SWRPG 2010 assessed that the region has a well-developed retail component, with the Cork Gateway and the Hub Towns of Mallow, Killarney and Tralee being the main focus for growth in retail development. They highlight that all three local authorities have developed retail strategies with the Cork City and County Retail Strategy being developed on a joint basis between the two local authorities. The guidelines also highlighted the key importance of tourism to the regional economy, this will be returned to and examined in further detail in the next stage of the study.

They confirmed that Cork City Centre is the primary comparison shopping centre of the region and forms the central core of any future retail strategy. The SWRPG 2010 assessed that both Mallow and Tralee/Killarney have a significant retail base, including both convenience and comparison goods. They advised that the provision of additional comparison shopping should be located in the existing city centre and town centres of the Cork Gateway and Hub Towns while the other main settlements should provide appropriate retail facilities for their populations in line with the requirements of the GRP. The SWRPG 2010 highlighted that while considerable comparison retail regeneration of Cork City Centre was taking place, Mallow, Tralee and Killarney town centres required significant retail upgrading.

### ***Mid West Regional Planning Guidelines 2010***

The *Mid West Regional Planning Guidelines 2010* (MWRPG 2010) covered the local authority areas of counties Clare, Limerick and North Tipperary and Limerick City. Reflecting the requirement to be consistent with the NSS 2002, the settlement structure of the region comprised the following:

- **Linked Gateway:** Limerick City and Shannon.
- **Hub:** Ennis.
- **Key Service Towns:** Ennistimon, Kilmallock, Kilrush, Nenagh (also a County Town), Newcastle West, Roscrea, Scarriff and Thurles.
- **Other Towns:** Abbeyfeale, Ballyvaghan, Borrisokane, Castleconnel, Corrofin, Croom, Foynes, Glin, Kilkee, Killadysert, Killaloe, Killimer, Lisdoonvarna, Milltown Malbay, Newmarket-on-Fergus, Portumna, Rathkeale, Sixmilebridge, Templemore, Toomyvara and Tulla.

These main centres in the regional settlement hierarchy are distributed across eight defined zones, with the majority within Zone 1 where the Linked Gateway and Hub are located. The MWRPG 2010 highlight that the NSS recognised that Limerick/Shannon/Ennis area as a Gateway/Hub Zone was a key component of the national strategy but that the area needed to be strengthened, to provide a platform for capitalising on the strategic location of the cluster. Reflecting this, an important objective of the guidelines is that the area would/should be developed in a coordinated way as a single integrated urban agglomeration that acts as the core driver of the region and a principal mechanism for attracting investment into the area. Within this equation, the MWRPG 2010 have the vision that an important component in the equation would/should be greater mutual working between the Gateways in the neighbouring regions, which reflects the importance of the critical mass of population and potential underpinning all now being part of the wider unitary Southern Region.

The preparation of the MWRPG 2010 in respect of retail development/potential was informed by the *Retail Strategy for the Mid West Region 2009* (RSMWR 2009). It was prepared when the significant impact of the recession on the retail sector was growing and the implications of this are reflected in the main conclusions of the RSMWR 2009 which can be summarised as following:

- i) There is a strong case for strengthening the position of Limerick City Centre in the regional shopping hierarchy and that this is best achieved through actively planning for additional non-bulky comparison goods floorspace in the City Centre;
- ii) The assessment indicates there is potential for a significant addition to shopping provision in the City Centre by 2016, even though there will be an over-supply of floorspace across the region as a whole;
- iii) There are policies in place which seek to maintain and strengthen Limerick's function as the MWR's primary retail centre and the development of a retail hierarchy which reflects the region's settlement hierarchy;
- iv) The growth or retention of retailing in established city and town centres is supported, as a basis for development consolidation; and
- v) Those centres in the Metropolitan Area (outside the City Centre) meeting the day to day needs of a local catchment population through the provision of main food shopping outlets should be supported and reinvigorated where necessary. However, their role should not be allowed to expand to encompass a materially broader range of comparison goods as this could lead to further competition with the City Centre. These retail centres and retail parks should not be expanded beyond a scale appropriate for a suburban shopping location in the Limerick Metropolitan Area.

The MWRPG 2010 do not make reference to ROCs as part of their potential in the retail landscape of the region. Additionally, although the RSMWR 2009 includes Factory Outlet Centres (FOC) in its Glossary of Terms in respect types of comparison goods shopping outlets, the Regional Retail Strategy does not promote/identify them as part of the future potential/dynamics of retailing in the Mid West Region.

### **South East Regional Planning Guidelines 2010**

The *South East Regional Planning Guidelines 2010* (SERPG 2010) cover Waterford City and counties Carlow, Kilkenny, South Tipperary and Wexford. As with the SWRPG and Mid West RPG, they are set to provide a strategic planning framework for the region with the objective of implementing the NSS 2002 at the regional level and achieving balanced regional development over the period 2010 – 2022 which recognises that the required critical mass will be achieved by Waterford City performing as a National Gateway, supported by Kilkenny City and Wexford Town performing as Hubs. However, the SERPG highlights that, in addition to these key centres, there is a distinctive settlement pattern in the South East Region which distinguishes the region from other regions where, in addition to the driver of the Gateway and two Hubs, it has a strong urban structure that includes three County Towns – Carlow, Clonmel and Dungarvan – plus other sizeable settlements. They specifically identify that each of these settlements have

their own hinterlands, sphere of influence and extensive services and provide the settlement framework for increased regional growth.

Importantly, the SERPG 2010 recognise – as almost an a precursor to the NPF 2018 and the region becoming part of the wider Southern Region – that the South East does not exist in isolation and there are issues that require a degree of inter-regional cooperation. They also highlight that there are areas at the periphery of the region that might not be as fully integrated and as well serviced as they might be. Specifically, the guidelines identify that the issues to be addressed include the development of strategic proposals for the networking of adjacent cities in the Waterford – Cork – Limerick – Galway Corridor to achieve a critical mass of population and to identify complementary functions so that these urban centres can develop as a networked counterbalance to the development of Dublin and the Mid East.

The above noted, the objective of this regional policy review is to examine the South East Region’s strategic retail planning context and the scope (or otherwise) for the delivery of a ROC(s) in the retail landscape. In this respect, the following require to be highlighted:

- It is an objective of the SERPG 2010 to support the development of the Waterford Gateway and combine the strengths of it, the Hubs and other key towns in the region, as envisaged in the NSS 2002, to achieve sufficient critical mass to compete with larger urban centres in other regions.
- Developing the main urban settlements as attractive places for people to live in and want to move to, where efficient public transport and quality public services and a high-quality environment make them attractive places to live, to work in and do business in.
- Promoting strategies to prioritise urban regeneration in order to improve and revitalise cities, towns and neighbourhoods and support local economies.
- The encouragement of the preparation of a Joint Retail Strategy for Waterford City and its environs. The central key objective of the Retail Strategy would be to support the ‘city centre first’ approach in the context of the retail hierarchy and to promote the vitality and viability of existing centres.
- The retail sector contributes significantly to the growth in employment and to the economic growth of the region. There is a need to ensure that the development of the retail sector serves to protect and enhance the vibrancy and vitality of the city and town centres. This will help address the leakage of retail spending to larger centres outside the region such as Cork City, Limerick City, Dublin City and the larger suburban centres in the Greater Dublin Area.

Below these relatively high-level principles in respect of retail development potential, the SWRPG 2010 do not get into the detail of what this should comprise. However, beyond the list of background documents set out in the brief to inform the study, the most recent retail strategies has been reviewed. In respect of ROC that for Waterford City provides the following relatively open-door advice:

*‘An outlet centre may be appropriate in Waterford City where it is located in a City Centre or an edge of centre site location with good potential for commercial synergy with the City Centre.’*

### **Draft Southern Region Spatial and Economic Strategy 2018**

The *Draft Southern Region Spatial and Economic Strategy 2018* (DSRS&ES 2018) was published in late 2018 and is in the process of finalisation. It sets out a 12-year strategic development framework for the Southern Region, with chapters addressing/examining the Economy, Environment, Connectivity, Quality of Life and Infrastructure. The DSRS&ES 2018 establishes a broad framework for development and the way in which society, environment, economy and the use of land should evolve and works towards a broad vision of the region’s future, identifying key priorities for investment. It also identifies the overall framework for development including; Metropolitan Area Strategic Plans (MASPs) for the Cork, Limerick – Shannon and Waterford Metropolitan Areas, Key Towns, smaller towns, villages and rural areas.

The overarching purpose of the RSES is to support the programme for change set out in the NPF Project Ireland 2014 and the parallel NDP (2018 – 2027), Government Economic policies and to ensure coordination of planning and development policy matters through the Development Plan and Local Economic and Community Plan (LECP) processes.

The draft RSES provide population projections to the horizon year of 2031 for both Cork City and Suburbs (283,669) and the Rest of the Cork Metropolitan Area (125,157). There is no specific allocation of population to settlements, as this will be a matter for the respective development plans.

Of key importance to this study is that **Objective 1** in the RSES identifies that the following underpins its delivery:

*‘Strengthening and growing our cities and metropolitan areas, building on the strong network of towns throughout the region and supporting our villages and rural are*

Inherent in this is that the three cities in the region – (together with Galway) drive the development of the region and perform as a counterweight to the over development of Dublin and wider eastern areas. Together with the strong network of towns and rural areas providing a basis for sustainable growth and the development of the region.

The overall strategy for the development of the region is built around the pillars of the three cities and their Metropolitan Areas. These are promoted as providing a key strength for the overall development of the region and implementing the national strategy of change in the direction of development of the country. Fundamental to this is that Cork, Limerick and Waterford cities and their Metropolitan Areas need to be sustainably planned for to ensure that they can absorb the significant scale of growth proposed, that they retain their essential character while at the same time ensuring quality with an emphasis on: compact urban settlements; efficient public transport networks; and, the provision of essential physical and social infrastructures which are required in tandem to accommodate future projected growth targets. The DSRSES acknowledges that delivery of this agenda will be a major challenge for the three cities and their Metropolitan Areas. Below the cities and their Metropolitan Areas, the DSRSES sets out the following Key Towns in the Strategic Planning Areas (SPA) in the region’s settlement hierarchy:

- i. South West SPA: Tralee, Killarney, Mallow and Clonakilty;
- ii. Mid West SPA: Ennis, Nenagh, Thurles and Newcastle West; and
- iii. South East SPA: Kilkenny, Carlow, Wexford, Clonmel, Dungarvan and Gorey.

#### *Retail Development & Potential*

Of key importance to this study is that the DSRSES identifies that one of the eight key issues which the strategy requires to address is retail development. It highlights that retailing is a significant part of the regional economy through the high level of employment generated and the contribution to the life and vitality of the region’s cities, towns and village centres. Importantly, in the context of this study and ROC(s) the DSRSES recognises that retailing has an important tourism dimension with retail services contributing to the attractiveness of a location for tourists and tourist visitors increasing footfall and potential increased vibrancy for the retail sector.

With regards to the strategic importance and priority for retail development, the DSRSES sets out the following for the Metropolitan Area Strategic Plans (MASP) for the three cities in respect of retail development and potential:

- **Cork MASP:** support the role of Metropolitan Cork as a Level 1 location for retail provision and the retail hierarchy for as identified in the Metropolitan Cork Joint Retail Strategy 2013 which sets out the following retail hierarchy:
  - Level 1: Metropolitan Cork – Cork City
  - Level 2: Large Metropolitan Towns – Ballincollig, Carrigaline, Cobh and Midleton
  - Level 2: District Centres – Blackpool, Douglas, Wilton, Mahon Point, Ballyvolane, Cork Docklands and Hollyhill
  - Level 3: Smaller Metropolitan Towns: Carrigtwohill, Glanmire, Passage West, Blarney and Monard
  - Level 4: Neighbourhood Centres and Large Village Centres
  - Level 5: Local centres, corner shops and smaller villages.
  
- **Limerick MASP:** the Retail Strategy for the Mid-West Region, 2010 to 2016, highlighted that Limerick City Centre fell behind other cities in the State and no longer performed to its Tier 1 Status in the shopping hierarchy. This was founded on the fact that too much trade was lost to suburban locations in the Limerick MASP. In response, it is an objective of the DSRSES to support Limerick City Centre in maintaining its dominant retail function in the Mid West retail hierarchy and the continued expansion and enhancement of retail development within Limerick City Centre.
  
- **Waterford MASP:** although the DSRSES highlights the importance of Waterford City and its suburbs as the key regional driver in this part of the Southern Region, supported by the Key Towns of Carlow, Clonmel, Dungarvan, Gorey, Kilkenny and Wexford, the role of retail development and potential in this equation is not examined or promoted.

## 2.4 Sub Regional

The Sub-Regional context for the policy review comprises the following suite of studies:

- Metropolitan Cork Joint Retail Study 2013;
- Metropolitan Area Cork Joint Retail Strategy 2015;
- Cork Area Strategic Plan Update 2008; and
- Draft Cork Metropolitan Area Transport Strategy 2019.

### ***Metropolitan Cork Joint Retail Study 2013***

The Metropolitan Cork Joint Retail Study 2013 (MCJRS – the Study) was commissioned by Cork County and City Councils in August 2012. It is a comprehensive detailed study of the retail landscape of the CMA and its potential at that time, noting that it was prepared when the impact of the recession was still having considerable implications in respect of assessed retail potential across all sectors of the retail market being delivered. Founded on this, the Study set out a suite of general policies and recommendations for the retail sector in the CMA. Those which are of particular relevance to the assessments of this study are that both Councils should:

- Encourage and foster retail development and vitality and vibrancy in the City Centre and in the Principal Towns and District Centres in the CMA.
- Promote Cork City Centre, the District Centres and CMA Town Centres as as vibrant and attractive areas thus encouraging their growth and development for retail, retail service, professional service and other complementary land uses.

- Recognise the primacy and promote and encourage the further enhancement of all forms of retail floorspace, particularly higher order comparison floorspace and city centre functions in Cork City Centre to sustain its competitiveness in line with its designation as a Gateway City within the NSS 2002.
- Support the vitality and viability of District Centres in the CMA and to ensure that such centres provide an appropriate range of retail and non-retail service functions to serve the needs of the community and their local catchment area. This noted, the Study advised that there should be an emphasis on lower order comparison floorspace in such centres in order to ensure the primacy of Cork City Centre as the primary location for higher order comparison retail development.
- Support the vitality and viability of the key centres in the CMA and to facilitate a competitive and healthy environment for the retailing industry into the future by ensuring that future growth in retail floorspace corresponds with the retail hierarchy and settlement strategy.
- Support the development of Core Retail Areas (CRA) as identified within the Study through a significant reduction in vacant floorspace and reinforce the role and function of the CRA by the appropriate development of identified opportunity sites.
- Adhere to the provisions of the sequential approach in the consideration of retail applications for developments located outside of CRA.

The above general policies set out in the Study underpinned more detailed retail policy recommendations. Those of specific relevance to this study are:

- i) The priority of developing Key City and Town Centre Sites; and
- ii) Promotion of Residential Development and Tourism Facilities in the City Centre and Town Centres. This recommendation, which is of particular importance to this study, is the recognition that the retention of tourism expenditure and the development of appropriate synergistic tourism facilities and activities will be important in the future development of the City and towns in the CMA most notably the City Centre, Midleton, Cobh and Blarney.

Although the Study does not promote/identify ROC or Factory Outlet Centre (FOC) in its recommendations, it does specifically recognise these as potential developments under its assessment criteria for assessing particular types of retail development. In addition to highlighting that the guidance in GRP 2012 in respect of such centres, the Study advises the following:

*‘Criteria for assessing such development should therefore focus on whether such a development is located in a strategic location to capture expenditure from a very wide catchment area. It must also be demonstrated that the products sold will not be in competition with those currently on sale in typical city/town centre locations. Such development schemes should preferably be located adjacent to or even within an existing city/town centre or in a location where a high quality public transport link can be provided. Out of centre sites are generally not appropriate for this type of development. Again, as such facilities are primarily geared towards the car borne customer, vehicular accessibility and adequate car parking will be key factors. The potential for such schemes to act as direct competition for city/town centres in the Metropolitan area will need careful evaluation in each case. As noted in the Guidelines the most appropriate location for outlet centres is likely to be where commercial synergy can be achieved between an outlet centre and an urban centre which would lead to economic benefits for the overall area. locations’.* It is stated in the Retail Planning Guidelines that the success of these centres depends on drawing customers and visitors from a wide catchment area, including tourists, and there may be implications for existing tourist centres and established town centres, even those some distance from the proposals.’

The agreed brief for this study is founded on the above principles set out in the 2013 Joint Retail Study.

### **Metropolitan Cork Joint Retail Strategy 2015**

#### *Overview*

The two Councils reviewed the findings of the above Study and adopted a Joint Retail Strategy (the Strategy) which was incorporated into their respective Development Plans. The Strategy formed the agreed basis on which both local authorities respectively formulated appropriate Development Plan objectives or policies in their areas and that these would be used in the determination of applications for retail development. The central objective of the Strategy was to identify:

- The broad guidance (sqm) on the requirement for additional retail floorspace development over the plan period in the overall area to support the settlement hierarchy
- The retail floorspace requirements both by quantity and type by constituent planning authorities
- Broad guidance as to the location and function of retail activity and the relevant settlement hierarchy.

While the Strategy was adopted in 2015 by both Councils, it makes reference to the onset of the economic recession of 2007 and its impact on the retail sector/retail development across the country. In response, it promoted that there required to be innovation in the retail sector not only in the CMA but across the State as a whole.

The 2015 Strategy reaffirms the 2012 floorspace data baseline established from the floorspace studies undertaken as part of the preparation of the 2013 Study. It modifies the potential for additional retail floorspace between 2011 – 2022, informed by more recent analysis/information on both delivered grants and vacant floorspace information. However, importantly, the Strategy reaffirms the role and importance of the CMA for comparison shopping, with some 98% of those living in the area carrying out their main comparison shopping within it. It also highlights the significant inflows of comparison expenditure to the CMA from the remainder of County Cork and adjacent counties. As the second biggest and most important City Centre in the country then these trends, although some seven years on from when the 2013 Study surveys were conducted, would generally be anticipated in 2019 – notwithstanding the impact/issue of online retailing.

#### *Future Potential for Additional Floorspace in the CMA*

The 2012 Study projected the indicative retail potential across all retail sectors (convenience, comparison and bulky goods) over the period 2011 – 2022 but was revised in the Councils' Retail Strategy 2015. This revised/amendment of the projections of the 2013 Study was underpinned by the inclusion/specific reference to vacancies, their potential and updated information in respect of the delivery (or otherwise) of granted permissions. Founded on this, Table 2.1 presents the indicative floorspace potential for the CMA between 2011 – 2022 as set out in the Strategy.

*Table 2.1: Indicative Floorspace Potential 2011 – 2022*

<b>Type of Floorspace</b>	<b>2011</b>	<b>2022</b>	<b>Total</b>
<b>Convenience</b>	3,557	43,173	<b>46,730</b>
<b>Comparison</b>	4,629	104,439	<b>109,068</b>
<b>Bulky Goods/Retail Warehousing</b>	0	57,555	<b>57,555</b>
<b>Total</b>	<b>8,186</b>	<b>205,167</b>	<b>213,353</b>

*Source: Cork Metropolitan Joint Retail Strategy 2015*

A comparative analysis of the projections between 2011 – 2022 against what were permissions at 2012 founded on the information provided in the 2015 Strategy for the CMA was undertaken as part of the Interim Report for this study. It indicated that based upon assumptions in the 2013 Joint Retail Study and the permitted floorspace between 2012 and 2018, there was scope and potential for a further 42,875 sqm of net mainstream comparison floorspace at 2022 and a total of 65,264 sqm if bulky goods floorspace is included and after all permitted floor space is included.

#### *Scope for new Forms of Retailing in the CMA*

The Strategy advises that retail trends should/would be monitored over the period to 2022 and that retail policies should be updated to reflect these trends where appropriate. To this end, it states that a monitoring system will be put in place by the two Councils to ensure that any necessary adjustments in policy can be made. However, it does not embrace the potential of ROC/FOC – innovative forms of retailing – potentially being part of the future retail landscape of the CMA, as indicated (subject to retail assessment criteria being met) in the MCJRS 2013. The focus in the Strategy is on the existing retail hierarchy and the potential for mainstream convenience, comparison and bulky goods floorspace.

#### **Cork Area Strategic Plan Update 2008**

CASP covers an area determined by a journey time of about 45 minutes from Cork City. This area has been defined as the Cork City-Region and includes Cork City, the satellite towns of Midleton, Carrigtwohill, Carrigaline, Ballincollig and Blarney, and the Ring Towns and rural hinterlands of Bandon, Macroom, Mallow, Fermoy, Youghal and Kinsale. It, therefore, extends well beyond the defined CMA area.

The CASP 2008 Update outlines that it delivers an updated strategy to that of the original one of 2001. Given that it was an update in 2008 and the economic baseline on which it was founded has been superseded by subsequent SWRPG 2010, the NPF 2018 and the DSRSES 2018 then it is questioned whether this baseline still remains relevant in respect to the foundations/considerations of this study. As such, our policy review notes the CASP Update 2008 but does not view it as key guidance/forecasts relevant to the assessment of the ROC(s) retail potential in the CMA or wider catchment potential of such a development(s).

#### **Cork Metropolitan Area Draft Transport Strategy 2040 (CMATS)**

A draft CMATS Strategy has been prepared by Transport Infrastructure Ireland (TII), the National Transport Authority (NTA) and Cork City and County Councils. It is currently on public display. It is an integrated land use and transportation plan for the Cork Metropolitan Area (CMA), which coincides with the area of the subject study. It covers the period up to 2040.

The current limitations of the public transport provision in the CMA are reflected in the low mode share for public transport of 5% across the whole day and all trip purposes. Only 7% of journeys to work in Cork City are by public transport. By comparison, walking has a 20% mode share, while the dominant mode is car which is used for 74% of trips. Cycling makes up the remainder of trips, with 1% of all trips made by bike. Cork's transport network is coming under increasing strain and the existing network will not support the future transport needs

The Strategy includes provision for a new light rail connecting Mahon Point to Ballincollig. See Figure [insert]. This will be a longer-term project for delivery towards the end of the Strategy period.

The Strategy also proposed to utilise existing rail infrastructure with a series of new stations and suburban services along the Midleton line and the main Intercity line. New rail stations will be provided as required by land use development, the track to Midleton will be dualled by 2040, along with increased frequency of train



service. Electrification of the line is proposed by the end of the Strategy period. Also, a series of Park and Ride facilities are proposed at key stations, including Blarney and Carrigtwohill.

The Road proposals include the Northern Ring Road to be provided towards the end of the Strategy period, in addition to the upgrade of the Dunkettle Interchange which would be undertaken in the short term.

## 2.5 Local

At the ‘local’ level in the spatial planning framework, the key policy documents which require to be reviewed to inform the study are as follows:

- Cork County Development Plan 2014, as varied.
- Cork City Development Plan 2015.
- Little Island Transportation Study.
- The 2017 Municipal District Local Area Plans – Blarney – Macroom; Bandon – Kinsale; Ballincollig – Carrigaline; Cobh; East Cork; Fermoy; Kanturk – Mallow; and, West Cork.

### ***Cork County Development Plan 2014, as varied***

The headline and vision of the *Cork County Development Plan 2014* (CCoDP 2014) is that it sets to look beyond the six-year timescale of development plans (which would be 2020) to that aligned to the SWRPG of 2022. The CCoDP 2014 provides multi-faceted policies in respect of urban spatial planning across the County but the focus of our review and analysis is the direction it provides in respect of town centres and retail, as set out in Chapter 7 of the Development Plan. It reflects that:

*‘Town centres are dynamic environments. With the challenges that they face today it is important that they reinvent themselves and evolve in order to provide attractive retail environments and a range of experiences and variety that can compete with alternatives.’*

The CCoDP 2014, reaffirms the principles set out in the successive GRP, namely that retailing is an important activity of town centres and contributes to much of their vitality. It highlights that the continued vitality of town centres is a key aim of the Development Plan and will be advanced by policies which generally favour retailing in town centres. Underpinning this, the CCoDP 2014 identifies that the County hosts a considerable retail profile, which is primarily located within the CMA and other main towns beyond this.

A full review and assessment of the CCoDP 2014 would indicate that retail policy is founded on ensuring that Cork City Centre is priority location for mainstream comparison floorspace with the next priority being the second-tier centres in the County’s retail hierarchy, with centres in the CMA being particularly identified – as would be the principle in Development Plans covering Gateway Cities/City Regions around the country. This is consistent with the recommendations of the 2013 Study and 2015 Joint City and County Strategy.

However, important to the prevailing policy context underpinning the assessment of the scope and potential for a ROC(s) in the CMA is Variation Number 1 of the CCoDP 2014 which was adopted as a variation to the Development Plan in February 2018. This incorporated the advice in the GRP 2012 in respect of Outlet Centres and provided the following additional guidance/criteria:

*‘Hence, having regard to the specific niche market that outlet centres operate within, applicants need to demonstrate that the products sold will not be in competition with those currently on sale in typical*

*city/town centre locations. In addition, applicants can benefit from proposing a location that attracts large numbers of tourists.*

*Furthermore, potential locations of outlet centres should be such that they complement existing retail offerings / established tourist areas, and having regard to the foregoing, locations within Metropolitan Cork emerge as the most appropriate location to create those economic synergies.*

*Any proposal for an outlet centre must demonstrate that the proposal meets the following criteria:*

- *will accommodate predominantly the retailing of end-of-season or discontinued items;*
- *demonstrate that the products sold will not be in competition with those currently on sale in typical city/town centre locations;*
- *demonstrate ability to reinforce existing tourism sector;*
- *the provisions of the Cork County Development Plan and Metropolitan Cork Joint Retail Strategy; the provisions of the Cork County Development Plan and Metropolitan Cork Joint Retail Strategy;*
- *the sequential test set out in chapter 4 of the Retail Planning Guidelines for Planning Authorities; the sequential test set out in chapter 4 of the Retail Planning Guidelines for Planning Authorities;*
- *is in accordance with the Planning Guidelines on Spatial Planning and National Roads in that the proposal can demonstrate that the development will not adversely affect the efficiency of the national road network and key junctions;*
- *will be served by existing or planned public transport services;*
- *will make adequate provision for private car use;*
- *will be accompanied by a traffic impact assessment, demonstrating compliance with the above criteria; and*
- *will take account of the vitality/viability criteria in respect of city/town centres set out in the Retail Planning Guidelines for Planning Authorities (2012) and avoid the incorporation of uses and activities, as part of the development, which are more appropriate to city and town centre location.*

The Variation established the principle for Outlet Centres being introduced to the CMA/County retail landscape by the Council but did not indicate/specify specific locations. Noting this, the Variation advised that the Council would undertake a detailed evidence-based assessment to confirm the need for such assessments, which would identify potential suitable locations.

### **Cork City Development Plan 2015**

*‘The vision for Cork City over the period of this Development Plan and beyond is to be a successful, sustainable regional capital and to achieve a high quality of life for its citizens and a robust local economy...’*

The *Cork City Development Plan 2015 – 2021* (City DP 2015) sets out Cork City Council’s (the City Council) policies for the development of Cork City to 2021 and beyond.

The focus of our analysis/assessment is what the City DP 2015 sets down in respect of retail spatial planning and whether this incorporates advice in respect of innovative forms of retailing.

### *Cork City Centre*

Cork City Centre is the principal retail centre of the South West Region and forms the first tier within the retail hierarchy. The City Centre exhibits a number of higher order retail, services and specialist functions not found elsewhere in the region and is the focus for higher order comparison retail development. The City Council's Strategy is to consolidate the City Centre as the primary retail destination in the region, and to be the prime focus for future retail development, in particular, high order comparison retail. This underpins Objective 4.3 of the City DP 2015 which seeks to achieve the following:

*'To protect and enhance the role of Cork City Centre as the primary retail centre in the south-west region by facilitating the continued regeneration and modernisation of existing and the development of new retail building stock, coupled with a range of complimentary leisure, recreational and cultural uses and investment in public realm improvements.'*

### *District Centres*

The second tier of the hierarchy consists of the four existing district centres in the Cork Suburbs of Blackpool, Wilton, Mahon and Douglas (mainly in Cork County), and the planned district centres at Ballyvolane, Hollyhill and Docklands. The existing centres are generally characterised by a large convenience/comparison anchor, a range of comparison outlets, local retail services, ancillary specialist convenience outlets, community and social facilities. The centres serve a localised catchment and serve weekly shopping needs. Mahon District Centre is the exception, providing a wide range of higher order comparison goods floorspace and a limited convenience goods offer.

### *Innovative Forms of Retailing*

The Retail Strategy incorporated in the City DP 2015 is focussed on the City Centre and other key centres in the City's Retail Hierarchy with no reference to innovative forms of retailing such a ROC.

### **Little Island Transportation Study**

The Little Island Transportation Study was on public display during the course of October 2018. The aims of the strategy were to:

- identify the existing transportation for Little Island
- Explore potential solution; and
- Ensure that there is an there is an integrated and balanced approach to transportation engineering for the future of the island.

The preferred scenario includes a combination of short term road capacity enhancement, a range of public transport improvements and a suite of demand management measures.

### **Municipal District Local Area Plans**

The brief for the study required that the following Municipal District Local Area Plans (MDLAP) be reviewed in the policy review:

- i) Blarney - Macroom
- ii) Bandon – Kinsale
- iii) Ballincollig – Carrigaline
- iv) Cobh
- v) East Cork
- vi) Fermoy

- vii) Kanturk – Mallow
- viii) West Cork

### *Planning Framework*

All of the MDLAP were adopted in 2017, noting that where, parts of the towns were formerly administered by Town Councils then these cover only the environs of each of the respective towns of Macroom, Kinsale, Cobh, Midleton, Youghal, Fermoy, Mallow and Skibbereen. The Town Councils were abolished in 2014. The spatial planning framework for the heart of the towns, which were under the administration of the Town Councils, is provided by Town Development Plans. These will remain in force until the adoption of the next County Development Plan in 2020.

### *Town Centre First*

In respect of all the MDLAPs, the priority is seeking to reinforce/consolidate retailing in the heart of the town centres. The development potential opportunities for this are identified in Appendix 4 of the CMA Joint Retail Study. These range in size and nature comprising a mix of redundant buildings and brownfield sites, with the size being of an appropriate scale to the potential of the respective town centres.

### *Outlet Centres*

Noting that the designated opportunity sites are limited in size, in advance of the February 2018 Variation 1 of the CCoDP 2014 which introduced the policy to accommodate Outlet Centres within the retail planning landscape of the County, the scope for this was introduced in a number of the 2017 MDLAPs, namely:

- Ballincollig – Carrigaline
- Blarney – Macroom
- East Cork – Midleton and Youghal
- Cobh.

While the scope/principle of Outlet Centres being appropriate within the retail planning framework of the above MDLAPs, no specific sites/locations for these were designated in the plans. From case study reviews of ROC in Ireland and the UK, then Outlet Centres require sites of between 8 – 12 ha accommodating both the centre and car and coach parking. As the examination of the Joint Retail Study town centre opportunity sites above reveals, none of these in the Metropolitan Towns is of the scale to accommodate a ROC within their respective town centres. If the policy objective of an Outlet Centre set out in these MDLAPs is to be delivered, then the only scope and potential to realise this is looking to the designated *Urban Expansion Areas*, albeit that the land use potential priority for each of these is for housing. This potential/principle or otherwise requires to be explored with the Council.

## **2.6 Conclusion**

The policy review has reaffirmed that the city centre/town centre first is the priority for new retail development which is in accordance with the GRP 2012 tests of the sequential approach. However, as has been highlighted, the 2018 Variation 1 of the CCoDP 2014 and in a select number of the 2017 MDLAPs introduce the policy potential for ROC/Outlet Centres being part of innovative retail formats in centres around the County. Therefore, whether the need for a ROC(s) is confirmed or otherwise in the study, the introduction of one or more could be in compliance with retail planning policy objectives.

## 3 Retail and Tourism Review

### 3.1 Introduction

This section provides analyses the ROC in Ireland and the UK with a view to allow for an initial assessment of the need for a ROC in the CMA. Currently the only comparable ROC to that envisaged in the brief in the Republic of Ireland is Kildare Tourist Village Outlet. The principal focus of the review of the sector is on the UK given the comparable retail market, availability of information and that potential operators in Ireland are likely to also have an operation in the UK, or also operate from the UK. In summary, this section will provide:

- An overview of the sector in terms of evolution of the model and current development trends;
- Undertake a series of case-studies to consider size of outlet relative to neighbouring urban area, trade patterns and indicated impact upon existing centres;
- Consideration of tourism synergies;
- Consider the impact of online retailing; and
- Review the retail landscape in the CMA

### 3.2 Overview of UK ROC Sector

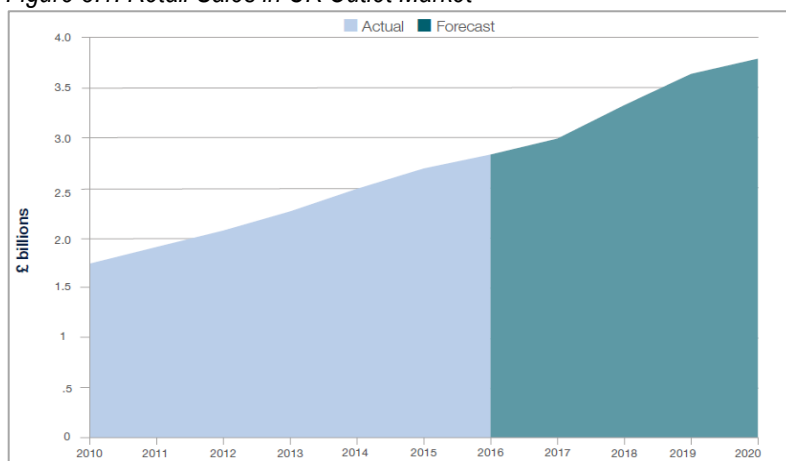
#### 3.2.1 Evolution of the Sector

The retail format/characteristics of outlet centres originated as Factory Outlet Centres (FOC) being initially located as part of or adjacent to the production facility (as indicated/reflected in earlier GRP). The first FOC was Clarks Village in Street, Somerset. These formats have evolved into designer outlets or Retail Outlet Centres (ROC). The outlet marked in the UK is somewhat fragmented in terms of the primary concepts on offer. It ranges from smaller FOCs selling seconds and last season's stock to ROCs, like Bichester Village operated by Value Retail, where goods on offer, although discounted, remain premium in terms of both brands offered and cost of product. Most schemes in the UK provide for a middle ground offer with prices that suit a wide demographic and brands that are also available in the high street. The most recent developments in the UK are of ROCs rather than FOCs, reflecting the maturing of the sector.

#### 3.2.2 Size and Outlook

These ROCs locating in out-of-town locations, selling end-of-line or last season products have seen considerable expansion over the last number of years in both sales and floorspace. Global data indicates that outlet centre sales were £2.8bn in 2018 with significant growth forecast to 2020. Discount clothing accounts for 41% of all sales.

Figure 3.1: Retail Sales in UK Outlet Market



According to Geolytix, there are 48 outlet malls in the UK. The top 15 account for c400,000 sqm or retail and leisure space. The average size of these top 15 outlets is 25,000sqm, dropping to an average of 15,000sqm for the next tier of outlets. A list of these schemes and their operators is provided in Appendix II. There has also been significant expansion in floorspace. This expansion is through a combination of new centres and extensions to existing ones. It has been estimated by Savills that 1m sqm of floor space will have been added to the sector between 2013 and 2020. The average annual footfall of the top 15 schemes is 4.12m.

### 3.2.3 *Expenditure and Frequency*

Around 30% of UK consumers visit an outlet centre once every 6 months. According to Realm the average spend per visitor in UK ROCs was £70 in 2016. Visitation patterns suggest that leisure is an increasingly important aspect of the growth in the sector, with food and beverages and other linked leisure trips to major leisure/tourist attractions being an important driver of the new developments. For example, the London Designer Outlet in Wembley has a strong leisure component with a cinema, food and beverage, in a centre located next to Wembley stadium and Arena. Similarly, Value Retail have a centre adjacent to Euro Disney in Paris. It should be noted that these associated leisure/tourist venues are significant attractors in their own right.

### 3.2.4 *Impact upon Existing Centres*

As is well documented, UK high streets are experiencing significant challenges in sustaining vitality and viability. The reasons for these trends are complex and multi-faceted including the impact of on-line retailing and corporate restructuring. The research reviewed is inconclusive in relation to the impact of ROCs on town centres. The sector is still relatively small relative to the overall retail provisions in UK towns and cities. Individual retail impact assessments for new ROCs and extensions to existing ones make assumptions in relation to trade diversion and impact upon existing centres within the relevant catchments. These are considered in further detail below in the case-studies.

### 3.2.5 *Future ROC Trends*

The outlet model is continuing to evolve. Traditionally, ROCs were in out-of-town locations, often associated with a smaller or medium sized town rather than a large urban areas (e.g. Bridgend, Clarks Village, Bichester Village, Cheshire Oaks). They have been destinations in their own right. However, more recently, new and expanded schemes are developing in larger urban locations such as London Designer Outlet in Wembley, Livingston Designer Outlet, Princes Quay in Hull and Hackney Walk in East London. The driver is to reach local greater catchments and tap into more local shopping trips. Complementary offer and a shared footfall are seen as significant advantages. Increasing the range of the offer also appears to a trend with a blend of fashion goods, food and beverage and other comparison goods reinforcing the attractiveness and resilience of ROCs. Associating a centre with other significant attractors in the form other leisure venues is also an emerging trend. The Greenwich O2, for example, is taking an existing leisure offer and supplementing it with a ROC. The ROCs therefore have the potential to evolve closer to an out-of-town shopping centre without the convenience element. However, planning authorities in the UK are applying very strict planning conditions and legal agreements to new developments to ensure the protection of existing town centres.

## 3.3 **Case Studies**

While relatively unique on the Island of Ireland, ROCs are prevalent across the UK, Europe and worldwide. Our research has determined that evidenced based information is on the whole historical as many ROCs are established. There is also the issue of planning systems in Europe and wider being very different to those which prevail in Ireland and the UK. ROCs have been reviewed for the purposes of analysing comparable cases examples. The principal characteristics of the CMA is that it has a population of c.400,000, it has high order comparison retailing provision, is the principal retail centre within a catchment

and has a population of c1m within 2 hours drivetime. It should also be noted that its catchment is curtailed by its coastal location. A review of UK examples highlights that there are no directly comparable examples as population densities are much higher and there are no similar regional cities fulfilling a similar function within their catchments. Notwithstanding this, examples of out-of-town centres have been reviewed and principal issues are highlighted. We have also reviewed the two principal ROCs on the Island of Ireland.

### Grantham

Grantham straddles the London–Edinburgh East Coast Main Line and the River Witham and is bounded to the west by the A1 north–south trunk road. Grantham lies about 37 km south of the county town, the City of Lincoln and about 35 km east of Nottingham. The population Grantham in 2016 was put at 44,580. The cities of Nottingham and Lincoln are in excess of 30km from the site.

This planned ROC by Rioja has recently secured planning permission for a ROC of 25,000 sqm. with 130 retail outlets, cafes, restaurants, 1,800 parking spaces and a visitor and tourism centre. It lies on the edge of Grantham town. It is scheduled to open in the spring of 2021 and is expected to attract 3.5 million visitors per year.

The Retail Impact Assessment (RIA) submitted with the planning application indicates that there was population of 3.4m within a 60 drivetime of the proposed centre. The RIA indicates that the proposed ROC would draw 37.5% of the its trade from within the 30-minute drive-time isochrone, 55% from the 30 to 60 minute drivetime, with the remainder of 7.5% from outside of the primary catchment. This suggests that the scheme will be heavily reliant upon resident expenditure within the catchment rather than drawing in tourist expenditure from outside.

Grantham’s town centre was deemed to be struggling, with high levels of vacancy and poor retailer representation. The RIA indicated that the ROC would draw trade from a wider area potentially contributing to the overall attractiveness of Grantham. There were a large number of other centres within the catchment and the assumed trade diversion impacts upon each was relatively modest. The trade diversion impacts upon the town centre was to be c2.6% is very low.

### Bicester Village

The town of Bicester is located 24km to the north of Oxford and has a population of 28,000. The ROC operated by Value Retail opened in 1995 and has undergone a series of expansions. It currently has a floor area of c27,000 sqm with 160 retail units in addition to cafes and restaurants. It provides for a higher end of branded offer and it is focussed on fashion goods with 80% of floor space allocated for this use.

The RIA for a permitted extension in 2015 indicates that 18% of visitors are from abroad. This therefore demonstrates that a higher end form of retailing attracts tourists and the centre is not merely reliant on residents within the catchment. Only 3.7% of expenditure at the outlet came from the immediate local authority council area. 8% of trade is drawn from within the catchment.

This would result in impacts of 0.16% on Banbury, 1.09% on Bicester, and 0.03% on Oxford City Centre. The impact upon Bicester itself was negligible and outweighed by the increase in expenditure being brought into the area result in an identified overall net economic benefit.

Out of the c4.5m UK and International visitors to Bicester Village per annum, more than 25% arrive by train/bus.

### **York Designer Outlet**

McArthur Glen operate this outlet which consists of c20,000 sqm of floor space. The ROC lies some 4.5 km to the south of York City Centre and to the south-west of the A64 and A19 junctions. A substantial amount of car parking wraps around the building, part of which is used as a Park & Ride (P&R) facility to the City Centre. It attracts over 4.5m visitors each year.

York City itself has a population of 199,000. However, the town centre itself has experienced challenges since the recession and vacancy rates in some parts are approaching 20%. The comparison goods market share achieved by the York Designer Outlet has increased from 0.6% in 2007 to 1.3% in 2010 and to 2.2% in 2016 and it accounts for 4.2% of the clothes market share in the City.

The impact of the outlet on the town centre is difficult to assess, as the research did not reveal any recent directly relevant impact assessments or surveys. However, retailing in the town centre has experienced significant challenges with vacancy rates approaching 20%. There is however no direct evidence to indicate that the ROC is responsible for the vacancies.

### **Kildare Tourist Outlet Village (KTOV)**

KTOV is located on the edge of Kildare Town at junction 13 of the M7. It is c60km from Dublin, 22km from Naas and 8km from Newbridge. It opened in 2006 and has developed in two phases resulting in a total floor area of 18,219sqm. It presently has over 100 units and 1,200 parking spaces. Recently, planning permission was granted on appeal for a 6,000sqm extension in 30 units and 460 parking spaces, resulting in a ROC of c25,000sqm (P.A Reg. Ref.17/539, ABP Ref:3000-95-18). A review of the transport considerations is provided in Section 6 above.

Kildare Town itself has a population of c19,000 and has very limited comparison retailing offer. There appears to be limited synergy with Kildare Town itself and the recent planning decision has sought to enhance connections to ensure that there are additional benefits to the town at large. The main comparison retail centre in County Kildare is Newbridge. There are a number of other tourist attractions in the area including the Japanese Gardens and the National Stud.

A visitor survey undertaken in the KTOV in 2016 found the following:

- 5% of all visitors were visiting having come from a tourist attraction or hotel
- 48% were either on holiday/day out or an overseas tourist.
- 79% came from towns outside of County Kildare

From the evidence, it appears as though this ROC is a strong retailing destination, probably benefiting from passing traffic on the M7. It has a particular attraction to domestic tourists visiting from outside the catchment.

The RIA accompanying a primary catchment of 60 minute drive-time, which includes Kildare, Dublin, Wicklow and parts of Meath. It had a population of 2.1m. The secondary catchment of between 60 and 120 minute drive-time had a population of 1.5m. The ROC therefore is seeking to serve a very significant proportion of the country. Trade draw from Kildare Town itself was 5%, while it was 15% from Newbridge and 30% from Kildare County as a whole. Dublin is included within a class defined as rest of the primary catchment and accounted for 40% of the trade draw. The RIA indicates that trade diversion from Newbridge as a result of the extension of c6,000sqm would be 2.3%. Based on this assumption, it suggests that the entire extended KTOV there would be a trade diversion of c9% from Newbridge. A recent health check for Newbridge suggests that the town was performing relatively well, and that vacancy rate was just under 10% of units, which were situated in the main part away from Main Street.



### Banbridge Village Outlet

Banbridge, with a population of c48,000, is on the A1 in Northern Ireland, at relative distance from Belfast City Centre and other main town centres both north and south of the border. The ROC opened in 2004 and has a gross floor area of over 19,044sqm. The ROC has over 79 units, a mix of both designer and high street brands with limited provision of supporting attractions – cafes and restaurants. Initially, the Outlet was successful in view of the retail offer, the design of the centre and the critical mass of population. However, it is no longer recognised as a mass attractor and this is reflected in the mix of tenants and offer which currently prevail. This noted, it is recognised as the second most important ROC on the Island of Ireland after, but well behind KTOV.

It is located adjacent to a Tesco store and other retail warehousing. Recently, a greater leisure and food and beverage offer has been developed to support the retail element. An Omniplex cinema complex opened in 2016 as part of the overall offer.

## 3.4 Tourism

### 3.4.1 Expenditure and Visitors

Failte Ireland provides data relating to tourism in the South West Area and County Cork for the year 2017. In 2017, 2.4 million overseas tourists visited the South West Region and spent €968 million. 1.8 million domestic visitors (residents in Ireland) visited the South West Region and spent €419 million. This averages at €403 per overseas tourist and €349 per domestic tourist. 1,605,000 overseas tourists visited County Cork in 2017 and spent €631 million. On the other hand, 1,113,000 domestic trips to Cork were taken, generating €202 million in revenue.

66% of tourists (overseas and domestic) came to County Cork by car. County Cork is the third most visited county by overseas tourists, behind Dublin and Galway but it is the second most visited by domestic tourists behind Dublin. Notwithstanding this, tourism revenue generated by overseas tourists is higher in Cork than Galway, but domestic tourists spend less (see Table 3.1 below). Further data is available on the daily spend per visitor which is noted as €94.59<sup>2</sup>.

Table 3.1: 2017 Performance for the Ireland's top three most visited Counties

	Cork	Galway	Dublin
<b>Overseas</b>			
Tourists (000s)	1,605	1,673	5,936
Revenue (€million)	631	589	1,981
<b>Domestic</b>			
Trips (000s)	1,113	1024	1,497
Revenue (€million)	202	247	307

### 3.4.2 Key Attractions

Failte Ireland provides information in relation to the most visited fee charging visitor attractions in the Country in 2017. The 11<sup>th</sup> and 12<sup>th</sup> most visited fee-paying attractions are in Cork, these are Fota Wildlife Park

<sup>2</sup> <http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/Publications/Growing-tourism-in-Cork-a-collective-strategy.pdf>

(455,559 visitors), Blarney Castle and Gardens (450,000 visitors). Then the Midleton Jameson Experience is in the 23<sup>rd</sup> position with 123,000 visitors.

In relation to free attractions, Doneraile Wildlife Park was the most visited in County Cork with 480,000 visits, making it the 7<sup>th</sup> most visited in the country, ahead of Crawford Gallery in 18<sup>th</sup> position (188,814 visits). The data does not differentiate between domestic and overseas visits in relation to attractions.

### 3.4.3 Cruise Tourism

Cruises play a growing role in the local economy. Data was available from Port of Cork, in relation to the number of liners and passengers per year. Between 2012 and 2017, Port of Cork recorded an increase of 19% in the number of liners stopping in Cork translating to the increase in c.66% of passengers and 56% in crew, suggesting much larger ships. Further reports appear to indicate that between March and September of 2018, 94 liners stopped in Cork, suggesting an increase of 38% between 2017 and 2018. The port company carried out cruise research on both passengers and crew and found that on average passenger and crew spent €81 during their time in the County. It also noted that visitors' money was spent as follows: 42% on shopping, 32% on excursion and travel and 17% on food and drink. Crew spend much less than passengers, with only €29 being reported and allocated mainly towards food and drink.

### 3.4.4 Forecast

In 2016, the Cork Strategic Tourism Task Force, composed of the members of the County and City Councils, Fáilte Ireland and others, published *Growing Tourism in Cork, A Collective Strategy*. This strategy includes a Strengths, Weaknesses, Opportunities and Threats analysis of the County tourism offer. In particular, it considers that its key strengths lie, inter alia, with its position between the Ancient East and the Wild Atlantic Way and the fact that it currently includes a strong base of assets, including Fota Island, the Blarney Stone or the Midleton Distillery. It does not the lack of 'iconic' tourist attractions, although there is a general lack of awareness of the County's assets.

The strategy also considers that the visitor number will increase by 21.3% between 2015-2020 and translating to an increase in 27% in revenue (spend-per-capita).

### 3.4.5 Tourism Potential of ROC

Tourism needs to be distinguished from general domestic leisure expenditure. Tourism results in expenditure not originating from the population resident within the catchment, but rather from expenditure by visitors from outside the catchment. Tourism spend in ROCs is therefore important, as it ensures that the outlet is a destination in its own right, and not merely resulting in trade diversion from nearby centres.

The potential which a tourism trade draw can play in ROCs is examined in the case-studies in Section 4.3. Bicester Retail Outlet, which targets overseas tourists, secures 18% of its trade from tourism. KTOV achieves 10% of its trade from tourist expenditure. In the context of a ROC in the CMA, it is reasonable to assume a figure of 10% of trade will come from tourists.

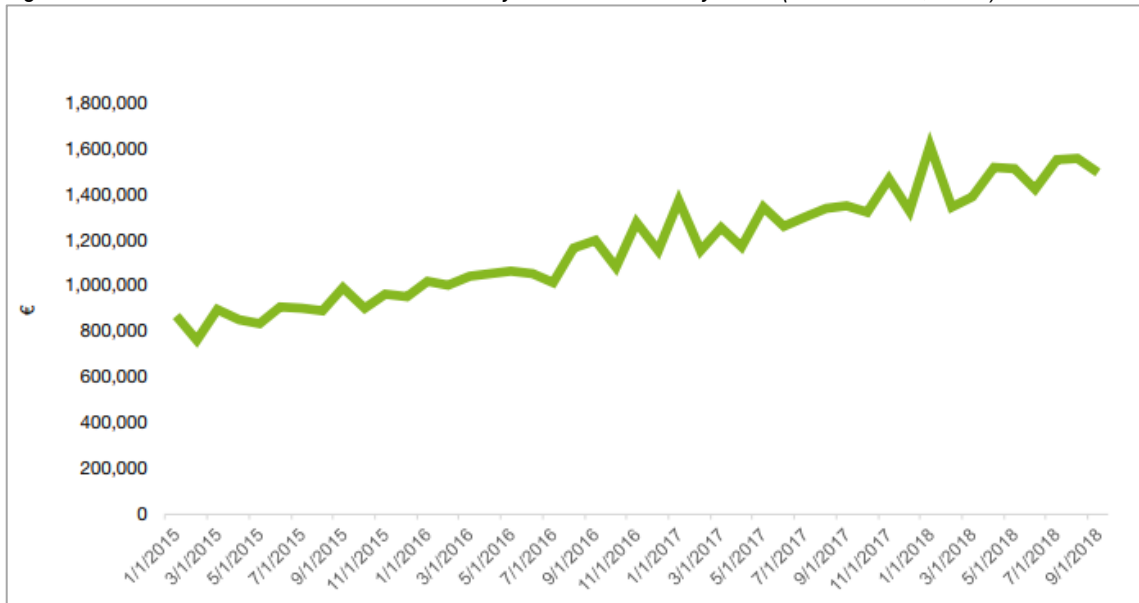
## 3.5 Impact of Online Shopping

### 3.5.1 Overview

Despite being an ever-growing trend, there is generally poor data reflecting the amount spent online and towards which goods by Irish consumers. The Central Bank of Ireland collated data indicating that e-

commerce card transaction have increased year-on-year by 21% between Q4 of 2017 and Q4 of 2018<sup>3</sup> and represents an increase by 50% since 2015.

Figure 3.2: E-commerce sales between January 2015 and January 2018 (source IBEC, 2018)



However, this number also includes phone payments. IBEC notes that the growth of online sales is generally ten times that of traditional ‘brick and mortar’ outlets (see Figure 4.2 above). Such continuing growth trends is partially inputted to a weak sterling, which entices Irish shoppers towards the British market.

### 3.5.2 Impact on Online Shopping on Retail Floorspace and Possible Adaptation

There is no clear data or evidence of the physical impact of online shopping on town centre retail and other retail surface. Although much of the data is quickly outdated due to exponential growth in the online retail, evidence suggests that continued growth in online shopping impacts upon the health of retail centres (Weltevreden, 2007; Singleton et al., 2016). The UK has experienced more significant changes to its high street due to competition with online shopping, and much of the research undertaken to date has pinpointed the resulting impacts on physical space as being one of three possible outcomes:

- Substitution, where e-commerce replaces physical shopping;
- Complementarity, where e-commerce provides a complementary offer to that offered in a traditional space; and
- Modification; which includes concepts such as ‘click-and-collect’ where the shopper buys online but collects the goods in store.

Further research considers that in order to compete, traditional retail spaces have to adapt and include experiential factors (Wrigley and Lambiri, 2014) and provide a broader range of activities, services, technologies within the area where shopping is being carried out (Digital High Street Advisory Board, 2015). Research suggests that retail located in the inner core of large urban / metropolitan areas are more resilient to the impact of online shopping. Similar observations have been made in relation to small specialist centres, serving a more convenience-orientated offer. More vulnerable centres on the other hand include secondary and medium sized centres, which cannot provide for diversity or where space cannot be adapted for modern retail.

<sup>3</sup> [https://www.centralbank.ie/docs/default-source/statistics/data-and-analysis/credit-and-banking-statistics/credit-and-debit-card-statistics/2018q4\\_ie\\_credit\\_debit\\_cards.pdf?sfvrsn=12](https://www.centralbank.ie/docs/default-source/statistics/data-and-analysis/credit-and-banking-statistics/credit-and-debit-card-statistics/2018q4_ie_credit_debit_cards.pdf?sfvrsn=12)

### 3.5.3 Real-Life Applications

As noted previously, there is a gap in how much is spent online and towards what types of good. General information suggests that it broadly include books, electrical goods and travel and concert tickets. Very few planning authorities have, to date, managed to quantify and qualify local residents' online spending. Oxford City Council encompasses a population of 150,000 inhabitants, so would be in broad terms equivalent to that of Cork City. It published in October 2017, a *Retail and Leisure Study* which sought, inter alia, to quantify and qualify online shopping habits of residents, as it was noted as a key contributor to the decline of viability and vitality of the centre. One of the key inputs to the study was a survey which looked at 'special forms of trading' including in particular internet shopping. The survey found that some 13.2% market share of comparison goods sales and 3% of convenience good was allocated to special forms of trading. It also refers to an increase in 16.2% between 2015 and 2016 in spending. Importantly, it refers to the importance of 'click-and-collect' models which accounted for 25% of comparison goods sold online.

## 3.6 Review of Centres in the Study Area

### 3.6.1 Existing and Permitted Floor Areas

Table 3.2 presents that provided as the baseline of trading retail floorspace in the Councils' MCJRS 2015. Although this is acknowledged to be historical, it is the most comprehensive information which is available at the time this report was being prepared.

Table 3.2: Net Retail Floorspace Breakdown Trading in 2012 (sqm)

Centre	Convenience	Comparison	Retail Warehousing	Total
Cork City Centre	16,201	88,407	6,860	111,468
Mahon District Centre	2,969	16,808	13,384	33,161
Blackpool District Centre	4,011	11,198	3,408	18,617
Wilton District Centre	4,022	7,272	0	11,294
Ballyvolane District Centre	4,001	2,011	924	6,936
Douglas District Centre	8,274	11,694	2,141	22,109
Suburban N'hood Centres	16,893	5,477	0	22,370
Suburbs Retail W'housing	0	79	44,506	44,585
Local Centres	4,471	1,333	1,013	6,817
Other Floorspace in Cork City	5,686	3,154	1,495	10,335
Passage West & Monkstown	1,399	145	0	1,544
Blarney	954	3,452	764	5,170
Glanmire	2,707	813	175	3,695
Carrigtwohill	1,962	1,678	5,029	8,669
Carrigaline	6,881	5,352	6,154	18,387
Midleton	8,529	9,423	7,407	25,359
Cobh	5,408	3,248	1,533	10,189
Ballincollig	9,728	11,445	2,784	23,957
Little Island	1,167	162	8,917	10,246
Other Rural	3,729	824	3,783	8,336
<b>Total</b>	<b>108,992</b>	<b>183,975</b>	<b>110,277</b>	<b>403,244</b>

Source: Cork Metropolitan Joint Retail Strategy 2015

As the table quantifies, in late 2012 there was a total of 403,244 sqm net trading retail floorspace within the CMA which comprised 27% convenience, 46% comparison and 27% retail warehousing/bulky goods. In respect of mainstream comparison floorspace (total 183,975 sqm), some 88,407 sqm (over 48%) was located in Cork City Centre. The other key mainstream comparison shopping locations in the CMA – Mahon, Blackpool, Douglas, Midleton and Ballincollig accounted for 32.9% of the total.

The Retail Study and subsequent Strategy, the former incorporated in the County and City respective Development Plans, can be recognised as dated in respect of the current retail landscape and potential. It would be highlighted that this is not unique to CMA and wider area. Information has been provided by Cork City Council and Cork County Council in relation to permissions granted since 2012. Cork City Council provided information on additional floor area granted up to 2017. Cork County Council has provided data on floor area granted up to 2018. Some of these permissions in the County area have been implemented (mainly discounters). For the purposes of the retail impact assessment to be undertaken in the next stage, extant permissions and those permissions which have been implemented during the 2012-2018 period need to be taken into account in any capacity assessment. Table 3.3 identifies the unimplemented retail planning permissions at 2012 and supplemented with some information provided by both City and County Councils for the period 2012-2018.

Table 3.3: Permitted Net Retail Floorspace Breakdown (sqm)

Centre	Convenience	Comparison	Retail Warehousing	Total
Cork City	488	4,651	1,630	6,769
Docklands	5,747	6,451	4,220	16,418
Northern Suburbs	1704	-141	0	1,563
Southern Suburbs	1,958	1,170	0	3,128
Mahon	45	-242	0	-197
Blackpool	0	2,043	6,842	8,885
Wilton	2,313	8,296	0	10,609
Douglas	2399	9,488	0	11,887
Ballyvollane	-27	1,893	0	1,866
Bishopstown	0	2,000	2,000	4,000
Ballincollig	1,843	1,479	0	3,322
Midleton	2,330	3,590	0	5,920
Carrigaline	1,170	0	0	1,170
Carrigtwohill & Fota Retail Park	6,548	1,105	20,474	28,127
<b>Total</b>	<b>26,518</b>	<b>41,763</b>	<b>35,166</b>	<b>103,467</b>

Source: Cork Metropolitan Joint Retail Study 2013 as supplemented by information provided by Cork City Council and Cork County Council

### 3.6.2 Overview of Existing Centres within the Study Area

The principal centres within the CMA are reviewed.

#### *Cork City Centre*

The Core retail area is focused around St. Patrick's Street and Oliver Plunkett Street and the streets that run perpendicular to these include Carey's Lane, Frenchchurch Lane, Academy Street, Opera Lane, Maylor Street, Caroline Street, Cook Street, Marlborough Street, and Princess Street. Retail activity is also found on Cornmarket and Castle Street and Paul Street. St. Patrick's Street is the principal retail thoroughfare and it is here that the majority of the major significant retail anchors and department stores are located. There is also a high level of international and national multiple representation with a good provision of higher order comparison retailing. Information from Cork City Council (March 2019) indicates that vacancy levels on key shopping streets was between 9-11% during the 2014 to 2017 period. The City Council also indicates that in June 2016, there was 449 vacant commercial units, representing an overall rate of 18%. These figures do not however distinguish between retail and other commercial uses. There appears to be a high vacancy level at first floor, but this is common.

#### *Mahon District Centre*

Mahon Point Shopping Centre is one of three designated district centres for the southern suburbs primarily serving the south eastern catchment and is located on the northern side of the N40 South Link Road. It comprises of a purpose-built standalone shopping centre. The centre serves a broad catchment area and is primarily a comparison shopping destination. The comparison shopping role significantly exceeds that usually represented within a district centre. This reflects the origins of the centre. It was permitted at a time where there were difficulties with site assembly and delivery in the city centre for significant additional comparison shopping. The centre accommodates a range of national, international and independent retailers. There is also the adjacent Mahon Point Retail Park which provides a large quantum of floor space for bulky goods comparison goods shopping.

#### *Blackpool District Centre*

Blackpool is a designated District Centre serving the northern suburbs of Cork City. The District Centre zoned land is made up of the Blackpool Shopping Centre, Blackpool Retail Park, Millfield Service Station, the former Sunbeam lands and Millfield Industrial Estate. The District Centre contains Blackpool Shopping Centre and a retail park. The shopping centre is anchored by Dunnes Stores. The Shopping Centre has a lack of national and international multiple retailers.

#### *Douglas District Centre*

Douglas performs the role as a District Centre particularly in terms of convenience shopping. The Joint Retail Study of 2013 noted however, that it does not perform as well as other centres in terms of comparison shopping and ranks below Mahon and Wilton in this regard. The centre also had notable rates of vacancy. The retailing needs of the catchment population are well provided for in terms of both convenience and comparison retailing by way of the two shopping centres, Douglas Village Shopping Centre, which integrates well with the traditional village centre of Douglas, and Douglas Court Shopping Centre.

#### *Wilton District Centre*

Wilton is the designated District Centre for the south west suburbs of Cork City consisting of Wilton Shopping Centre and a parade of shops, retail service and other commercial units on the Bishopstown Road / Cardinal Way. The majority of the shopping centre dates from the late 1970's and comprises a single storey internalised mall surrounded by surface car parking with a lack of active external frontage. The shopping centre comprises of two anchor stores, Penney's and Tesco, and around 60 retail shops that range from large and medium sized units to smaller outlets. The bulk of the retail units in the existing shopping centre are operated independently with a limited representation of national and international multiples. It provides for lower order comparison offer.

### *Ballincollig*

Ballincollig is the largest town in the County. Ballincollig is located approximately 10 kilometres to the west of Cork City. It performs an important function for the surrounding population in providing a good range of convenience, comparison and retail services. It is particularly well served by convenience retailers, with SuperValu, Dunnes, Lidl and Aldi all represented. Independent comparison retailers are well represented. The 2013 Joint Retail Study indicated a high vacancy level

### *Midleton*

Midleton is a stand-alone market town located c23km from Cork City serving a wide catchment in east Cork. Traditionally, the main commercial and retail area of the town was on the Main Street, which continues to offer retailing needs, primarily with independent retailers and businesses. The commercial extent of Midleton has extended to the old site of Midleton Mart to the north west of the town centre and to the west with the Water's Edge development. Market Green shopping centre was developed on the former mart site in 2005. It has a strong niche tourism sector with the Midleton Distillery attracting significant numbers and has a good range of restaurants and cafes. It provides for niche and middle order comparison retailing offer.

### *Other Centres*

There are a number of other centres within the CMA which provide for lower tier comparison and convenience offer. These include Blarney, Cobh, Carrigaline, Carrigtwohill, Glanmire, Ballyvolane and Passage West. Cobh has an important tourism role and untapped potential in this regard. Tourism infrastructure has significantly improved with the opening of the Titanic Experience Museum and the introduction of boat trip tours to Spike Island. Large cruise ships often dock in the town, but the expenditure from these tourists does not seem to have reached its full potential.

Carrigaline performs an import function as a satellite town of Cork City Centre and accommodates a range of important retail and retail service functions. Existing convenience retailers within the town include SuperValu, Dunne's Store and Lidl and a number of symbol stores. The comparison sector of the town is defined by a number of independent retailers.

Blarney offers an attraction as a tourist destination, linked to Blarney Castle and the Woollen Mills. Retailing in the town is primarily targeted towards the tourist market, most notably by way of Blarney Woollen Mills and a number of tourist / gift shops.

Carrigtwohill provides limited comparison floorspace is provided within the town and this is primarily concentrated within Fota Retail Park. The existing range of convenience floorspace within the town is primarily focussed around the Main Street.

Glanmire to the north-east of Cork City is served by the Hazelwood development at Riverstown which generally provides for the day to day needs of the catchment population, by way primarily of the SuperValu store and a number of retail services.

Passage West has experienced decline due to the loss of traditional industries and the dockyards. Convenience and lower order retailing are focussed around the Main Street.

## 4 Transport Network Overview

### 4.1 Introduction

This section of the report provides an overview of current and proposed future transport networks within the Metropolitan Area and surrounding region. The primary focus of the review relates to:

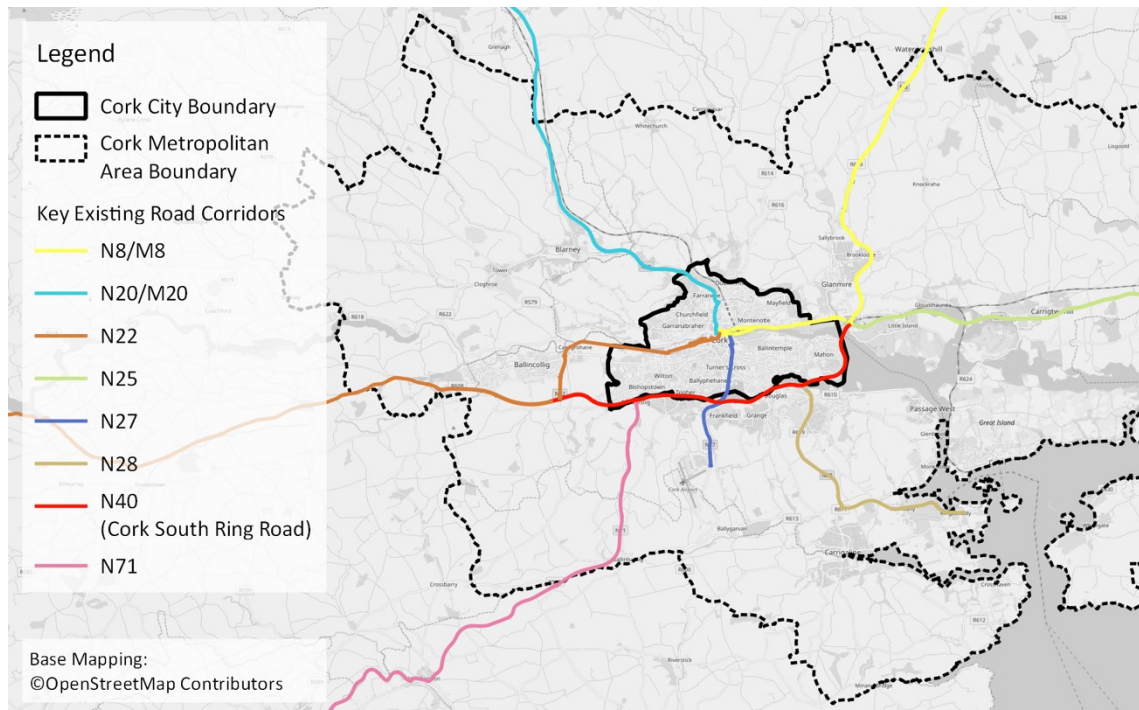
- the strategic road network (in light of the typically large customer catchments for the type of development proposed; and
- both intercity and commuter rail, the former with potential to cater for customer access needs in a sustainable manner, and the latter to accommodate staff travel requirements.

The review of future transport networks has included the National Development Plan 2018-2027 and Draft Regional Spatial and Economic Strategy (RSES) for the Southern Region, both of which provide a strategic focus for development of transport infrastructure within the region.

### 4.2 Existing Cork Metropolitan Area Road Network

The strategic road network within the Cork Metropolitan Area is illustrated in the following Figure 4.1 and comprises a series of radial corridors with intersect on either the N40 Cork South Ring Road or within the City Centre.

Figure 4.1: Existing Cork Metropolitan Area Strategic Road Network



As can be seen from the preceding Figure 4.1, the network comprises the following strategic radial roads:

- N8/ M8 (Cork City Centre to Dublin) – varies between two-way road with one lane in each direction in City, to motorway with two lanes in each direction + hard shoulder.
- N25 (N40 to Waterford/ Rosslare) – dual carriageway with two lanes on each direction + hard shoulder.



- N28 (N40 to Ringaskiddy) – dual carriageway which varies between one to two lanes in different sections of the road.
- N27 (Cork City Centre to Cork Airport) – dual carriageway which varies between one to three lanes in each direction along different sections of the road.
- N71 (N40 to Bandon) dual carriageway with a single lane in each direction + hard shoulder.
- N22 (Cork City Centre to Killarney) – dual carriageway with two lanes + hard shoulder in each direction.
- N20 (Cork to Limerick) – dual carriageway with two lanes in each direction.

In addition to the above key radial roads, the N40 Cork South Ring Road, which passes through Cork City’s southern suburbs represents the key orbital road in the Cork Metropolitan Area. It connects the:

- M8 and M25 (at Dunkettle Interchange); with
- N28 (at Bloomfield Interchange),
- N27 (at Kinsale Road Interchange);
- N71 (at Bandon Road Interchange); and
- N22 (at Ballincollig East).

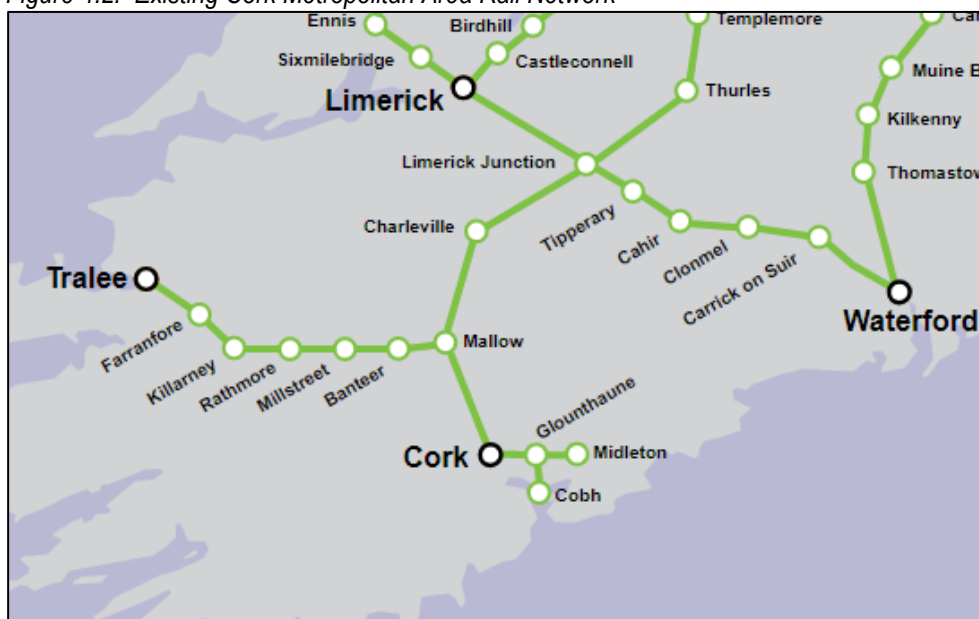
The road’s layout varies between two lanes without hard shoulder to the northeast (vicinity of Jack Lynch Tunnel) to up to three lanes plus hard shoulder, before narrowing to two lanes in each direction hard shoulder further west.

### 4.3 Existing Cork Metropolitan Area Rail Network

#### 4.3.1 Suburban and National Rail Network

Cork Metropolitan Area is served by two types of rail services operated by the Irish Rail/ Iarnród Éireann: intercity services and commuter services. All services pass through Cork Kent Railway Station, which is located circa 1.5 kilometres to the east of Cork City Centre core and is the key railway hub within the Metropolitan Area. A schematic rail network map Metropolitan Area and surrounding region is presented in the following Figure 4.2, with the available intercity and commuter services elaborated upon in respective subsequent subsections.

Figure 4.2: Existing Cork Metropolitan Area Rail Network



Source: Irish Rail/ Iarnród Éireann

### 4.3.2 Intercity Rail Services

The intercity services include the following routes within the study area:

- to Limerick (with transfer at Limerick Junction) with travel time ranging from 1:33h to 2:03h and stops in Mallow and Charleville;
- to Ennis (with transfer at Limerick Junction) with travel time ranging from 2:20h to 3:18h and stops in Mallow, Charleville, Limerick, and Sixmilebridge;
- to Tralee (direct or with transfer in Mallow) with travel time ranging from 1:55h to 2:30h and stops in Mallow, Banteer, Millstreet, Rathmore, Killarney, and Farranfore; and
- to Waterford (with transfer at Limerick Junction) with travel time ranging from 3:05h to 4:29h and stops in Mallow, Limerick Junction, Tipperary, Cahir, Clonmel, and Carrick-on-Suir.

It is noted that services from Cork to the key regional transfer hub at Limerick Junction continue to Dublin, however the more distant part of this route extends past the study area boundary, therefore it was deemed irrelevant to this study. Detailed information on selected intercity routes is presented in the following Table 4.1.

Table 4.1: InterCity Rail Travel Times and Frequencies

Destination	Travel Time	Frequency	Connections	Car Travel Time
Ennis	2:20-3:18h	Every two hours	1 (Limerick Junction)	2:00h
Cahir	1:50-2:00h	Twice per day	1 (Limerick Junction)	1:00h
Limerick	1:33-2:03h	Once every hour	1 (Limerick Junction)	1:30h
Tipperary	1:28-1:50h	Twice per day	1 (Limerick Junction)	1:15h
Tralee	1:55-2:33h	Every two hours	0/1 (Mallow)	1:45h
Charleville	0:36-0:56h	Every two hours	0/1 (Mallow)	1:00h
Waterford	3:05-4:29h	Twice per day	1 (Limerick Junction)	1:45h

As can be seen from the preceding Table 4.1, existing intercity rail services offer good level of connectivity between Cork and some of the key population centres within the southwestern region, including Limerick, Tralee, and Ennis. Notwithstanding the need to transfer on some routes, which may discourage passengers, rail services offer a viable alternative to the car thanks to broadly comparable travel times and attractive frequencies. Conversely, areas located to the east of Cork Metropolitan Area, with Waterford as key population centre, lack sufficient connectivity by rail due to the existing rail network layout and resulting indirect routing.

### 4.3.3 Commuter Rail Services

Commuter rail services around Cork Metropolitan Area offer the following connections from Cork Kent Station:

- to Midleton in the east, with stops at Little Island, Glounthaune, and Carrigwoohill;
- to Mallow in the north (direct); and
- to Midleton to the east, with stops at Little Island, Glounthaune, and Carrigwoohill, with a branch to Cobh, with stops at Fota, Carrigaloe, and Rushbrooke.

Further information in relation to commuter rail services in the study area is presented in the following Table 4.2.

Table 4.2: Commuter Rail Travel Times and Frequencies

Destination	Travel Time	Frequency	Car Travel Time
Mallow	25-30 minutes	20-30 minutes peak, 1 hour off-peak	35 minutes
Cobh	24 minutes	30 minutes peak, 1 hour off-peak	31 minutes
Midleton	23 minutes	30 minutes peak, 1 hour off-peak	28 minutes

As can be seen in the preceding table, commuter services provide good connectivity within and around parts of Cork Metropolitan Area which they serve, offering both attractive frequencies and travel times.

#### 4.4 Proposed Cork Metropolitan Area Road Network

The National Development Plan 2018-2027 has included a number of improvements and upgrades to the national and inter-urban roads within the southwest of Ireland to be delivered in the period 2018-2027. In particular, the following relevant planned developments have been identified, which will reduce the average journey times and improve regional connectivity:

- M20 from Limerick to Cork;
- N8/N25 Dunkettle Interchange improvements;
- N28 Cork to Ringaskiddy Road; and
- N25 New Ross Bypass.

The M20 road connecting Cork to Limerick road is expected to be delivered by the year 2027. At the appraisal stage of this project, design and construction of Cork North Ring Road will be examined, which would link the new M20 to Dunkettle Interchange, bypassing the inner-city section of the N8.

Relevant schemes included within the National Development Plan are presented in Figure 4.3.

Figure 4.3 Proposed NDP Road Schemes

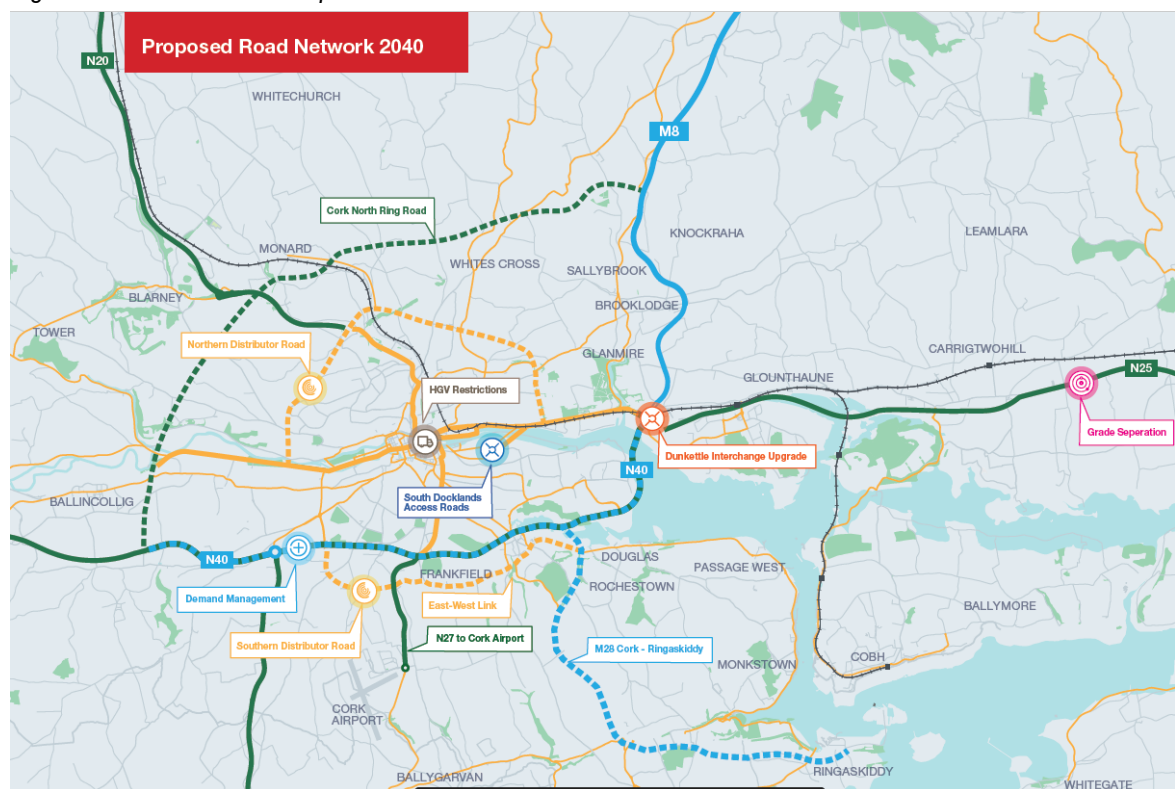


Further schemes to improve connectivity within the Cork Metropolitan Area and beyond are included within the Draft RSES and Draft CMATS. The Strategy time horizon is year 2040, however it is due to be reviewed in years 2026 and 2033, with the former being the specific focus of the current issue. The following schemes have been named in the RSES Strategy:

- N25 enhancement between Cork and Waterford;
- N22, N25, N27, and N71 improvements as Interregional and Intra Regional corridors;
- R624 upgrade between the N25 and Marino Point; and
- R630 upgrade between Midleton and Whitegate Road

The Northern Ring Road is indicated in the Draft CMATS Strategy for delivery at 2040, and the Dunkettle interchange by 2026.

Figure 4.4: Draft CMATS Proposed Road Network 2040



As the timelines for the Cork North Ring Road indicates that it would be delivered towards the end of the CMATS strategy period in 2040 and that no timeframe is indicated for the other schemes in the Draft RSES, they have not been considered within the strategic transport impact analysis summarised in this report.

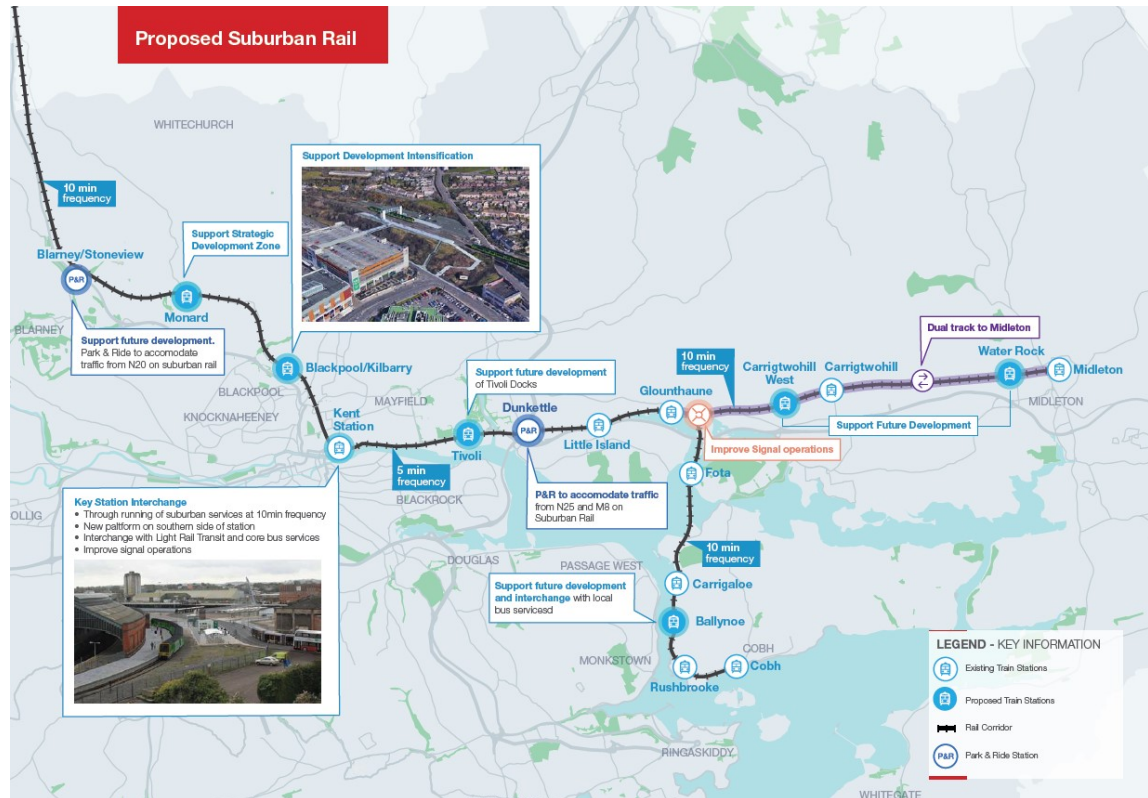
#### 4.5 Proposed Cork Metropolitan Area Heavy Rail Network

The Regional Spatial and Economic Strategy (RSES) for the Southern Region also provides information about rail network improvement and expansion schemes within Cork Metropolitan Area and the broader region. Railway schemes have also been listed in the 2017 version of the Cork 2050 report, which was filed as submission during the National Planning Framework consultation stage.

The Draft CMATS proposes the enhancement of the commuter rail service within Cork Metropolitan Area by providing additional stations and fleet improvements, including electrification of the infrastructure and

fleet. New stations are planned to be constructed at Blarney/Monard, Blackpool/Kilbarry, and Dunkettle. All the above stations are expected to offer park-and-ride services. In addition to that, new stations are also planned at Tivoli Docks, Ballynoe, Carrigtwohill West, and Water Rock. These improvements will be accompanied by rail traffic control systems upgrade.

Figure 4.5: Draft CMATS Proposed Rail in 2040



A commuter rail network with through running at Kent Station between Mallow and Midleton lines has been proposed as part of the Cork 2050 report, with station improvements and new stations construction also mentioned. In the long term, it is aimed to reopen the rail route linking Cork and Midleton to Youghal.

Kent Station is planned to be upgraded to become a key interchange node between commuter and long-distance rail, bus network, and the proposed light rail service (see Section 6.6, which follows), in addition to improvements to walking and cycling environment. Improvements in the signal operation in the Cobh corridor are to be delivered for better service in the network.

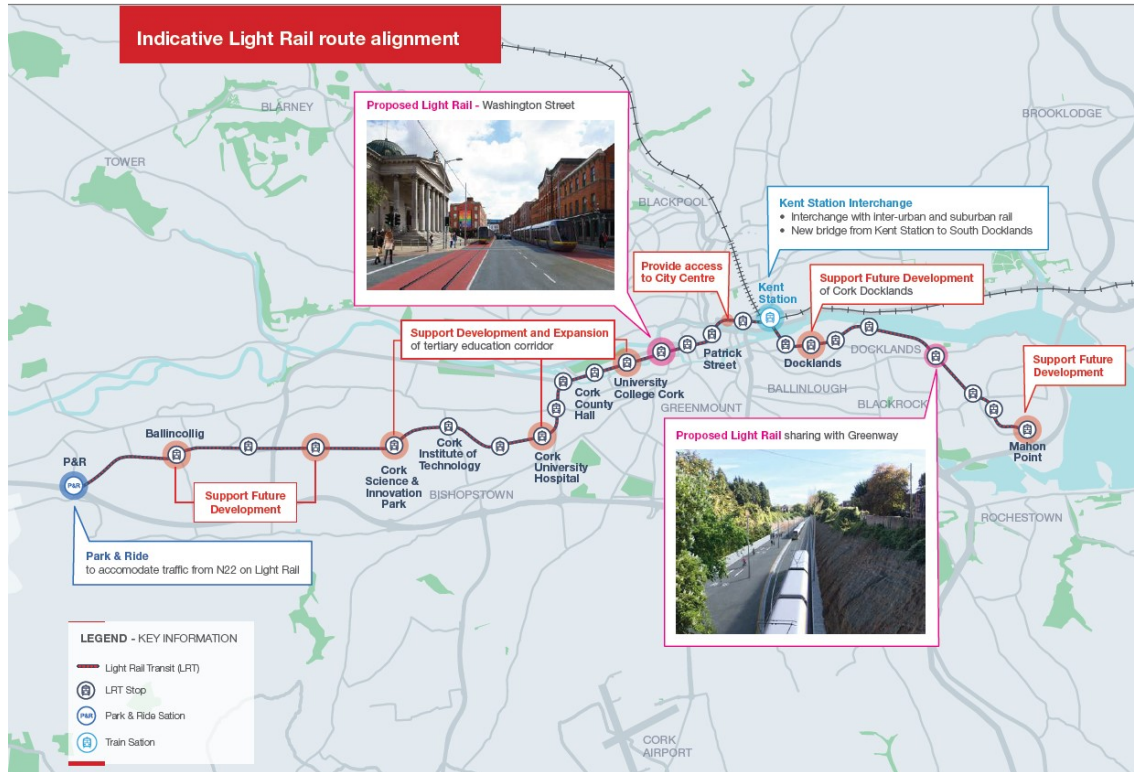
#### 4.6 Potential Light Rail Link

An east-west light rail public transport corridor has been mentioned as supported by the Southern Regional Assembly among other schemes within the draft Cork Metropolitan Area Strategic Plan (MASP), under Policy Objective 8 and within the draft Regional Spatial & Economic Strategy (RSES) for the Southern Region.

In addition, the Draft CMATS includes a potential light rail link corridor running between the City Centre and suburban areas along an east-west route from Ballincollig to Mahon via the City Centre, as shown in Figure 4.6.

The corridor along the potential light rail link has been identified in the RSES and Cork MASP as passing through key development areas, with a more public-transport-oriented development on both greenfield and brownfield sites to be pursued.

Figure 4.6: Proposed Light Rail Alignment



CMATS envisages that the Light Rail will be implemented by 2040.

## 5 Catchment Analysis and Retail Capacity Assessment

### 5.1 Introduction

A catchment analysis is a key component of the strategic transportation assessment for the study. In addition, catchment identification and analysis are also required to underpin the retail capacity potential within an identified catchment. It should be emphasised that the outputs of the assessment are sensitive to inputs and assumptions. These inputs have been based upon the best available information.

This section provides an analysis of retail capacity or potential within the catchment having regard to population, expenditure, market demand and existing provision. The following methodology is adopted:

- **Step 1:** Identification of the catchment or study area
- **Step 2:** Population forecasts
- **Step 3:** Estimate of available expenditure within the study area.
- **Step 4:** Estimation of turnover of existing and permitted development within the catchment
- **Step 5:** Identification of additional comparison floor area requirements

For the purposes of this assessment, it is assumed that the ROC would encompass circa 18,000 sqm Gross Floor Area (GFA), which is broadly comparable with the current area of the sole equivalent development within the Republic of Ireland, i.e. Kildare Tourist Outlet Village (KTOV), i.e. 19,000 sqm<sup>4</sup>. Due to the lack of other comparable developments, relevant characteristics of KTOV have informed further assumptions relating to a potential ROC within the Cork Metropolitan Area. A retail base year of 2019 is adopted and opening year of 2023 has been selected for both the strategic transportation review and the retail impact assessment. This opening year allows sufficient time for designing the scheme, securing planning permission, and constructing the development. It should be noted, however, that the centre may not be fully trading until a further two/three years after opening.

The catchment analysis has utilised forecast population data, received from the National Transport Authority (NTA). Such forecast data is consistent with the Draft Regional Spatial and Economic Strategy (RSES) for the Southern Region, and the analysis has been undertaken utilising geographic information systems (GIS) software. Other sources of information include the CSO's Annual Services Inquiry (ASI), relevant retail strategies and information on pipeline and permitted development.

### 5.2 Step 1: Identification of Catchment

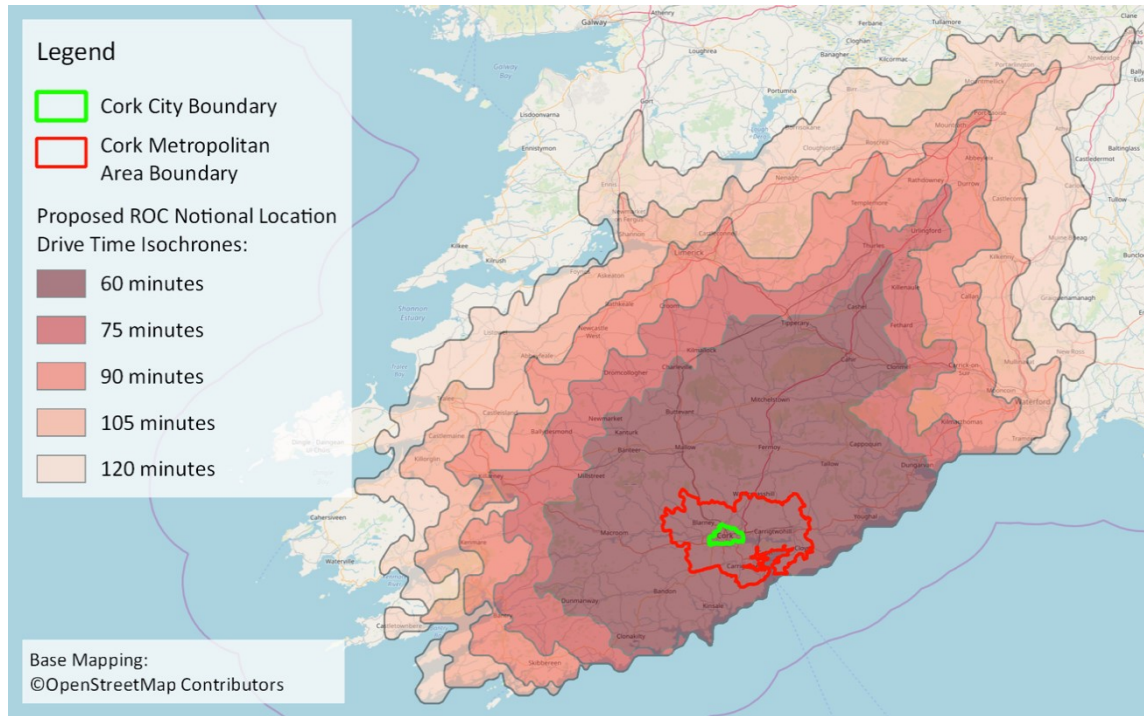
International experience suggests that such developments are typically located in close proximity to the strategic road network (dual carriageway or motorway classifications). As such, the catchment analysis summarised within this section of the report has been informed and influenced by the alignment of the strategic road network (an overview of which is provided in the preceding Section 4).

The catchment of the proposed development has been established with regard to population distribution in the southwest of Ireland and the layout of the road network in the region. In identifying the catchment, special consideration was given to potential catchment overlap with KTOV, which is currently the only competitor of the proposed Cork ROC in the Republic of Ireland.

<sup>4</sup> The figure given excludes the current proposed Kildare Tourist Outlet Village extension by ca. 7,000 sqm, which was granted planning permission by An Bord Pleanála in late 2018.

To inform the catchment identification process, a 2-hour car travel time isochrone of a notional site within Cork Metropolitan Area was generated, as shown within Figure 5.1.

Figure 5.1 Notional Cork ROC Location's Drive Time Isochrones



As can be seen within the figure above, the 2-hour isochrone area covers most of south-western Ireland, extends up to approximately mid-way between Limerick City and Galway City in the north and reaches Naas in the Greater Dublin Area in the east. It is also apparent that KTOV is located within the 2-hour isochrone of the notional Cork location analysed, giving rise to a significant catchment overlap. To account for this, a more detailed catchment analysis was undertaken, including generation of 60-minute and 90-minute isochrones for both KTOV and the notional Cork site analysed, which were then compared to determine a theoretical boundary between their catchments. This stage of the analysis has been illustrated in Figure 5.2.



Figure 5.2: Catchment Boundary between Proposed Cork ROC and KTOV

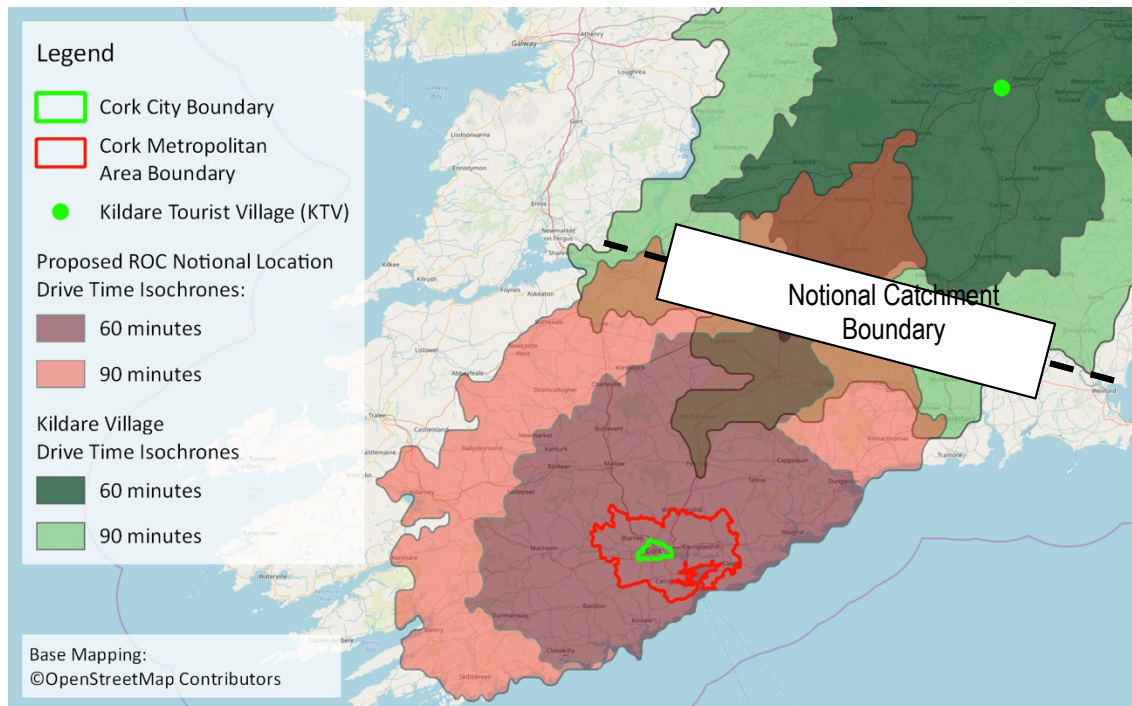


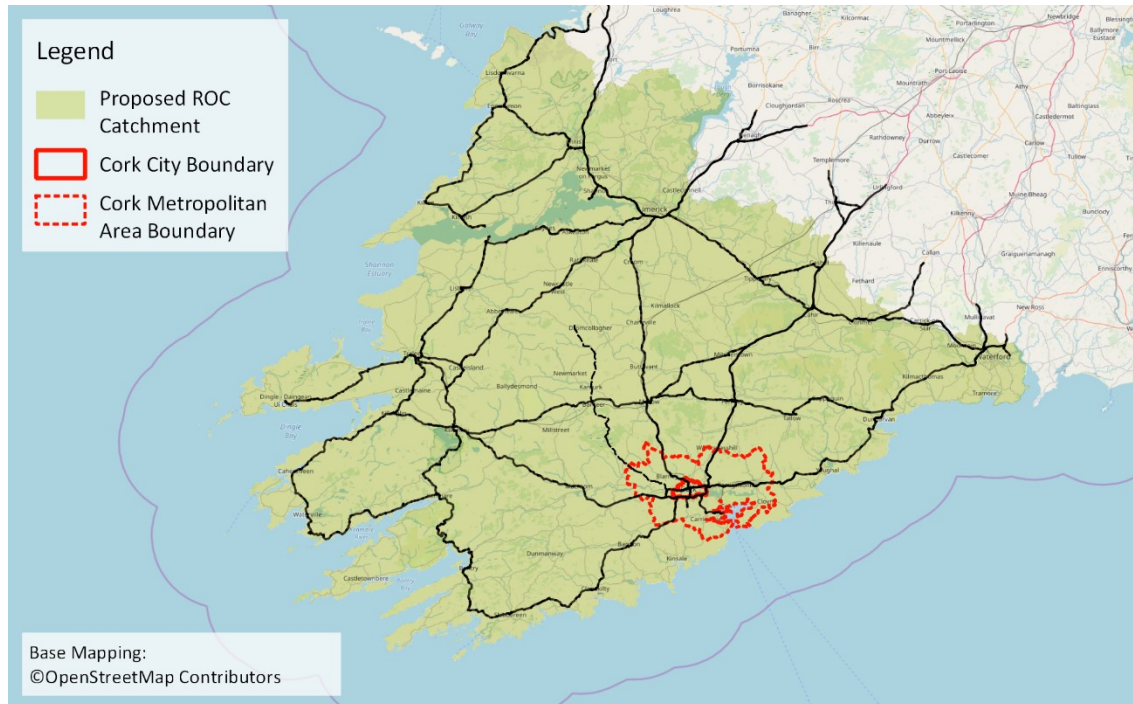
Figure 5.2 above shows that a theoretical boundary between the catchments of KTOV and the proposed Cork ROC can be approximated by a line extending from Waterford City in the southeast to Limerick City in the northwest. Both of these population centres have been included within Cork ROC catchment for the purposes of this study.

The following further consideration has driven the final catchment identification:

- As no competitor retail centres of similar nature to the proposed Cork ROC are located to the west of Cork, it has been assumed that the catchment will include all areas extending to the Atlantic coast, notwithstanding travel times in some occasions exceeding 2 hours. It has been acknowledged that travel distance plays an important role in potential customer willingness to travel and this has been accounted for at a further stage of the analysis (strategic traffic impact analysis within the subsequent Section 8 of this report).
- Considering the previously established 2-hour drive time isochrone area, areas north of Limerick City, including Shannon and Ennis, have been included in the proposed Cork ROC catchment.

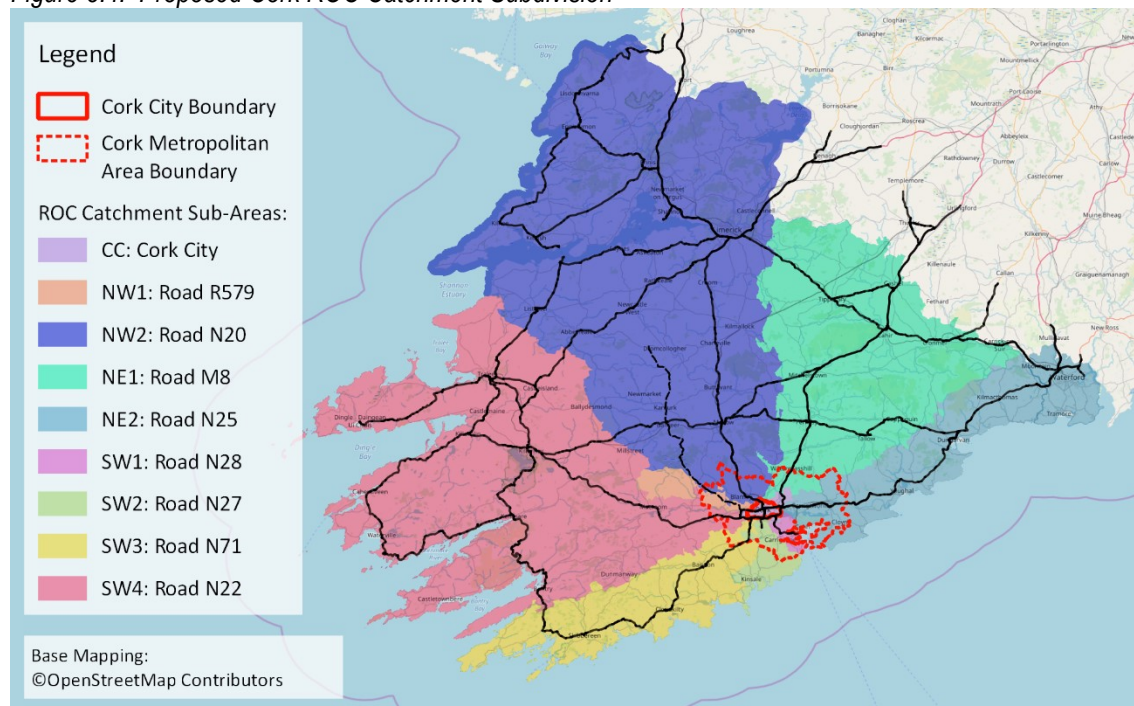
The proposed Cork ROC catchment determined as described above and utilised in further analysis is presented within Figure 5.3.

Figure 5.3: Proposed Cork ROC Catchment



To enable a comparative suitability and impact assessment of a range of notional locations for the proposed Cork ROC within the CMA, it was necessary to introduce further subdivision of the overall catchment identified. In doing so, the layout of key roads connecting various locations within the catchment with respect to Cork have been analysed, with individual sub-catchments associated with each road being identified, as per Figure 5.4.

Figure 5.4: Proposed Cork ROC Catchment Subdivision



Catchment population and the associated population distribution have been identified as key parameters and were analysed based on the current and forecast population data on the level of small statistical area provided by National Transport Authority for the years 2011, 2035 and 2050. Data is understood to be consistent with the National Planning Framework in addition to the Draft Regional Spatial and Economic Strategy (RSES) for the Southern Region.

### 5.3 Step 2: Population Forecasts

Based on the forecast population data received from the National Transport Authority, 2023 (Year of Opening) and 2035 (Year of Opening + 15 Years) population figures have been derived via linear interpolation. Subsequently, population sizes within the overall catchment as well as the individual sub-catchments were established, with relevant 2023 forecast population distribution data presented in Table 5.1 below.

Table 5.1 Cork ROC Development Catchment Population

Sub-Catchment	Key Road	2019 Base Year	2023 Population Forecast	% Population
NW2	N20	392,818	400,736	32%
SW4	N22	202,886	207,104	17%
NE2	N25	184,265	189,424	15%
Cork City	-	170,203	176,908	14%
NE1	M8	146,297	148,536	12%
SW3	N71	63,218	63,543	5%
SW2	N27	30,330	30,547	2%
SW1	N28	24,533	25,076	2%
NW1	R579	11,880	11,932	1%
<b>Total</b>	<b>-</b>	<b>1,226,430</b>	<b>1,253,807</b>	<b>100%</b>

Source: NTA Transport Model

As can be seen from the above table, the largest three sub-catchments are as follows:

- NW2 (N20 corridor to Limerick City), with 32% of the ROC's catchment population;
- SW4 (N22 corridor to Killarney), with 17% of the ROC's catchment population; and
- NE2 (N25 Corridor to Waterford), with 15% of the ROC's catchment population.

### 5.4 Step 3: Estimate of available expenditure within the study area

#### 5.4.1 Expenditure per capita

Expenditure per capita is calculated based on the information contained within the Annual Services Inquiry (ASI) published by the CSO. The most recent ASI is from 2016. The ASI is listed as the preferred source for expenditure per capita in the Cork Retail Study 2013. This source is therefore used for the purposes of this capacity assessment.

The CSO have provided specific data for the study on the most appropriate categories for estimating expenditure per capita for comparison retailing. The relevant categories are:

1. Retail sale in non-specialised stores (471)

2. Retail sale of food, beverages and tobacco in specialised stores (472)
3. Retail sale of information and communication equipment in specialised stores (474)
4. Retail sale of other household equipment in specialised stores (475)
5. Retail sale of cultural and recreation goods in specialised stores (476)
6. Retail sale of other goods in specialised stores (477)
7. Retail sale via stalls and markets (478)

The expenditure per capita figures have to be inflated in accordance with the Consumer Price Index (CPI) between 2016 and 2019. Assumptions are made in relation to inflation having regard to the ECB's target rate of 2%. Table 5.3 gives expenditure per capita figures for the ASI base year, the retail base year for the project and the design year.

Table 5.3: Expenditure per Capita (2016 Prices)

Year	Comparison Expenditure per Capita
2016	€ 3,642
2019	€ 3,724
2023	€ 4,031

Source: CSO ASI

It is noteworthy, that the expenditure per capita figures are below those provided in the Joint Retail Study, due to low inflation over the period. The expenditure per capita for 2023 is estimated to be €4,031 in comparison to €4,614 in the Joint Retail Study. This has a significant impact upon the resident expenditure available within the catchment and the consequential demand for further retail floor space. This lower expenditure per capita figure is a reflection of the impact of the recession, but more importantly the impact of internet retailing, which is considered in further detail below.

#### 5.4.2 Adjustments to Available Expenditure

There are several factors to take into account in establishing the available expenditure within the catchment. The main element is the expenditure available from residents. However, this has to be adjusted to reflect inflows and outflows of spending. These adjustments are considered below.

##### *Internet/online Shopping*

The Joint Retail Study considered the impact of online and internet shopping on available expenditure. It only assumed that 1% of expenditure was affected and this was used as an assumption to 2022. However, more recent evidence would suggest that the impact of internet shopping has been greater than anticipated. In the first instance, it should be noted that the figures for expenditure per capita detailed in Table 5.3 above, excludes the NACE category “retail sales not in stores, stalls or markets” (479). This category includes retail sales. This category of expenditure was 8% of the total comparison expenditure, or a rise from 1.4% in 2013. However, this does not account for the growth in retail sales between 2016 and 2019, or the potential growth to 2023. The review in of literature and other surveys relating to internet shopping, indicate that up to 13% of expenditure is directed to online shopping (refer to 3.5.3 above). This would indicate that an adjustment of an additional 5% for internet shopping would be appropriate.

##### *Tourism Expenditure Inflows*

The Metropolitan Cork Joint Retail Study assumed an inflow of 13.4% into the Cork area. This consisted of national and international. tourism expenditure and expenditure from residents living just outside the identified catchment. The *Retail Strategy for the Mid West Region (2009)* indicated a tourist expenditure inflow of c11%. So for the purposes of this report, we are assuming an expenditure inflow of 13.4%. This does not account for the specific tourism revenues directly associated with an ROC. This is accounted for specifically in the context of the retail impacts of specific identified locations.

### *Expenditure Outflows*

The Joint Retail Study assumes that the CMA retains 98.4% of its comparison expenditure, indicating a very low level of leakage. It is therefore assumed that 1.6% of comparison trade leaks outside the catchment.

#### 5.4.3 *Catchment Area Expenditure*

The level of available expenditure is calculated by multiplying the resident population by the per capita spend. This is then adjusted to account for expenditure inflows and outflows. This is illustrated in Table 5.4 below.

Table 5.4: *Catchment Expenditure*

<b>Period</b>	<b>%</b>	<b>Expenditure (€)</b>
<b>2019</b>		
Resident Expenditure		€4,567,225,320
Add Expenditure Inflow	13.4%	€612,008,193
Less Expenditure Outflow	1.6%	€73,075,605
Less Adjustment for Internet	5%	€228,361,266
<b>Available Expenditure</b>		<b>€4,877,796,642</b>
<b>2023</b>		
Resident Expenditure		€5,054,067,636
Add Expenditure Inflow	13.4%	€677,245,063
Less Expenditure Outflow	1.6%	€80,865,082
Less Adjustment for Internet	5%	€252,703,382
<b>Available Expenditure</b>		<b>€5,397,744,235</b>

Source: *MacCabe Durney Barnes*

The total available expenditure rises from €4,877m to €5,397m between the base year of 2019 and the design year of 2023.

## 5.5 **Step 4 – Estimate of Turnover of Existing and Permitted Floor Area within the Catchment**

### 5.5.1 *Trading Floor Area*

#### *Cork Metropolitan Area*

Table 3.3 indicates that there was some 41,763 sqm of permitted mainstream comparison floor area in the CMA. Of this, 16.2% of total floorspace was in respect of proposed developments in Cork City Centre with the other key ones being proposals for new mainstream comparison floorspace in Cork Docklands and Wilton District Centre and Douglas Shopping Centre. As retail warehousing has not been developed pursuant to the permissions, and given the overhang in the market, these figures have been discounted in calculating the existing/pipeline floor space for the purposes of this study.

### Outside the CMA

The floor area elsewhere in the catchment has to be established. This has been done from a number of sources. These include the *Cork Strategic Retail Study (March 2008)* and the *Retail Strategy for the Mid West Region (2008)*, which covers Limerick County and City and Clare County. Floor survey information for Waterford was obtained from *Waterford City and County Retail Strategy (2009)*. While the floor space information may be somewhat dated, there has been very little comparison retail development during the period of the recession. Updating this information is beyond the scope of this study. No survey information is available for County Kerry, and therefore an assumption has been made in relation to the floor area available within the County and based upon comparison floor area per capita for County Clare. While Killarney may have a larger quantum of comparison floor area than this would allow for, the high level of tourism expenditure inflows into the Kerry would counteract this anomaly.

### Overall Floor Area within the Catchment

Based upon the assumptions and information outlined above, Table 5.5 provides an outline of the trading comparison floor area available within the catchment. Vacancies are normal part of any functioning property market. Excessive levels of vacancy may be taken into account, but are not included within this strategic assessment, owing to a lack of survey information.

Table 5.5: Existing and Permitted Floor Area 2019

<b>Centre</b>	<b>Comparison Net Retail Sales Area (sq.m)</b>	<b>Bulky Household Goods (sqm)</b>	<b>Combined comparison Net Sales Area (sqm)</b>	<b>% of Total</b>
<b>Cork Metropolitan Area</b>				
Cork City Centre	93058	6860	99,918	10%
Mahon District Centre & Retail Park	16,566	13,384	29,950	3%
Blackpool District Centre & Retail Park	13,241	3,408	16,649	2%
Douglas District Centre	21,137	2,141	23,278	2%
Wilton	15,568	7,272	15,568	2%
Midleton	13,013	7,404	20,417	2%
Ballincollig	12,924	2,784	15,708	3%
Other CMA	40,251	67,024	107,275	11%
<b>Sub Total</b>	<b>225,758</b>	<b>110,277</b>	<b>328,763</b>	<b>34%</b>
<b>Remainder of Cork County</b>				
Ring Towns			30,995	3%
County Towns			28,850	3%
<b>Sub Total</b>			<b>59,845</b>	<b>6%</b>
<b>Planning Authority Outside Cork County &amp; City</b>				
Limerick City Centre	98,249	36,428	134,677	14%
Limerick County	64,765	61,261	126,026	13%
Waterford City	39,252	41,444	80,696	8%
Clare County	34,460	34,438	68,898	7%
South Tipperary (part)	46,122	31,099	77,221	8%
Kerry County	42,730	42,703	85,434	9%
<b>Sub Total</b>	<b>325,578</b>	<b>247,373</b>	<b>572,952</b>	<b>60%</b>
<b>TOTAL</b>	<b>551,336</b>	<b>357,650</b>	<b>961,560</b>	<b>100%</b>

Source: Cork Metropolitan Joint Retail Study 2013, Cork Strategic Retail Study 2008, Retail Strategy for the Mid West Region 2008, Waterford City and County Retail Strategy 2008

### 5.5.2 Turnover Ratios and Estimates

It is possible to derive the turnover of existing floorspace within the catchment area by multiplying the floorspace in each category by the average turnover per sq. m. In considering appropriate turnover levels it is important to have regard to the different nature of retail floorspace provided across the catchment area. While data available for the turnover of retailers in Ireland is limited, it is clear that existing comparison floorspace within the city centres for example will yield a significantly higher turnover per sq. m. than existing lower order comparison floorspace provided within the smaller metropolitan towns.

Likewise, smaller symbol stores also yield a significantly lower turnover per sq. m. than large department stores. For the purposes of this study a turnover of €7,000 per sqm for non bulky goods is assumed for the main cities (Cork, Waterford and Limerick) and the main towns within the CMA in the base year. Elsewhere, a turnover ratio of €6,000 per sqm is applied for non bulky goods. comparison floorspace. An average turnover of €2,500 per sq. m. is assumed for bulky goods in the base year. A growth factor is applied to reflect increased efficiencies in 2023.

Table 5.6: Turnover Ratios/sqm

Category	2019	2023
Non-bulky comparison		
City and Metropolitan Centres	€7,000	€7,210
Other Centres	€6,000	€6,180
Bulky comparison	€2,500	€2,575

Source: MacCabe Durney Barnes

The turnover of existing and permitted floor space is obtained by multiplying the turnover ratios by the floor area in the base year and design year. This is illustrated below in Table 5.7

Table 5.7: Turnover of Existing and Permitted

Category	2019 Turnover of Existing and Permitted	2023 Turnover of Combined Existing and Permitted
Comparison non-bulky	€3,777,639,400	€ 3,890,799,992
Comparison bulky	€894,125,300	€ 920,949,059
Total	€4,671,764,700	€ 4,811,749,051

Source: MacCabe Durney Barnes

## 5.6 Step 5: Estimate of Additional Comparison Floor Area Potential

A comparison of the turnover of existing/permitted and the available expenditure within the catchment allows for an establishment of an expenditure headroom in the forecast year. This can then be converted to allow for a consideration of potential indicative floor space by applying a turnover ratio per sqm. Given that this available expenditure would be distributed between cities and rural towns, a range is indicated of potential floor space is indicated. Table 5.8 below illustrates this.

Table 5.8: Indicative Floor Area Potential

2023 Available Expenditure	2023 Existing and Committed Turnover	2023 headroom	Floor space Requirement (sqm)
€5,397,744,235	€4,811,749,051	€585,995,184	90,000-100,000

Source: MacCabe Durney Barnes

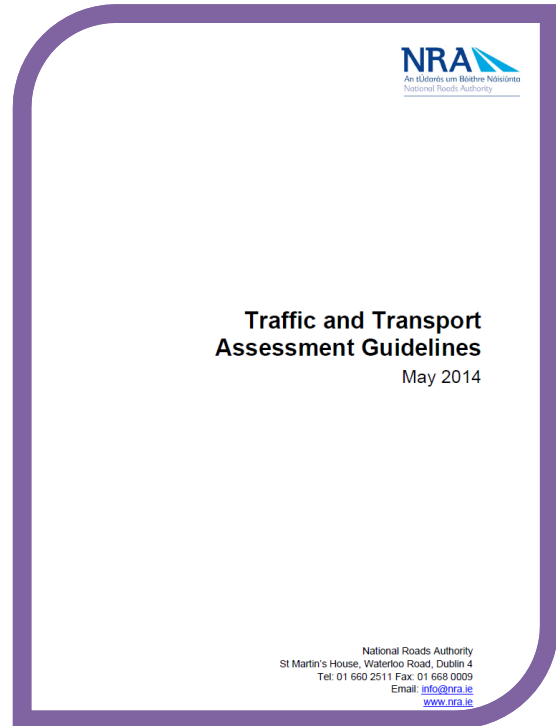
It should be highlighted that this indicative potential is after the pipeline of permitted but unimplemented mainstream comparison floor space in the CMA, is taken into account.

## 6 Strategic Transport Impact Assessment

### 6.1 Introduction and Methodology

The approach underpinning the strategic transport assessment summarised in this report has been informed by and is consistent with best practice, namely Transport Infrastructure Ireland's (TII's) 'Traffic and Transport Assessment Guidelines' (May 2014). In summary, it has comprised analysis of the traffic impacts on the strategic road network via the following key steps:

- Analysis of the catchment for the ROC, based on an assumed 2:00 hours' drive catchment, and determination of its unique catchment, considering overlap with the existing metropolitan Tourist Outlet Village (as per Section 5.2);
- Subdivision of the study area into a series of sub-areas, with potential development of the ROC analysed within each sub-area (as per Section 5.2);
- Development of an appropriate transport baseline (2018), reflecting traffic volumes on the current strategic road network within the study area and determination of peak network hours for weekday assessment and weekend (Saturday) assessment scenarios;
- Forecasting future year traffic conditions for the year of opening (2023) and year of opening +15 years (2038), using relevant current TII growth factors;
- Estimation of the proposed development's traffic generation characteristics, based on available data from an existing development of comparable type and scale (Kildare Tourist Outlet Village);
- Based on potential development of the ROC in each sub-area, analysis of population distribution patterns (location and distance from the centre), and related assignment of development traffic onto the strategic road network in 2023 and 2038 assessment years;
- Determination of the percentage increase in traffic resulting from the proposed ROC development on the strategic road network within the study area for peak network hours on both assessment days (Thursday and Saturday) and both assessment years (2023 and 2038), and calculation of an overall traffic impact assessment index; and
- Consideration of opportunities for the development's access needs to be accommodated by public transport.
- Consideration of the practical implications of developing in a short-list of potential locations emerging from this analysis shall be undertaken section 8 of this report.



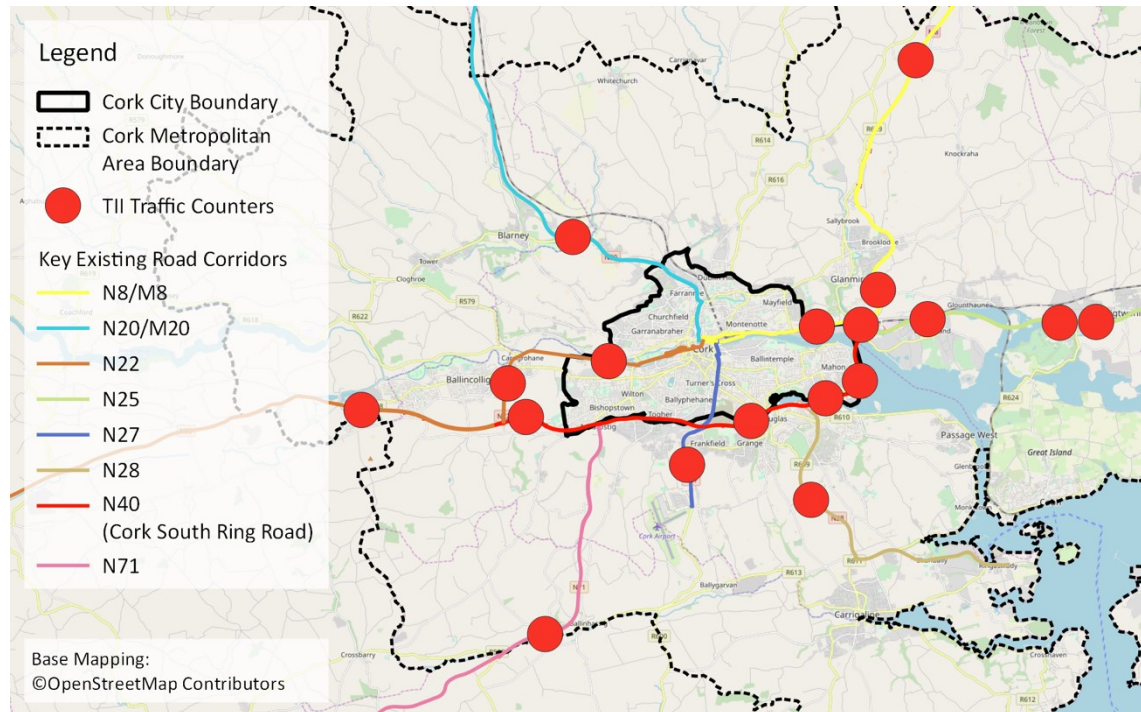
### 6.2 Transport Impact Model Structure

Given the preliminary planning status of the proposed ROC and strategic nature of the current transport assessment, it has been deemed appropriate to utilise a spreadsheet model in assessing its traffic impacts. In line with best practice and in accordance with relevant guidance, the model has been developed for the proposed Cork ROC Year of Opening (2023) and Year of Opening + 15 Years (2038).



As the proposed Cork ROC is forecast to generate significantly higher traffic flows on weekends than on business days, two time periods have been modelled, namely the Thursday (typical business day) and Saturday (typical weekend day) network peak hour for the strategic road network within Cork Metropolitan Area. The network peak hours have been established, based on the traffic flow data available for the TII traffic counters located on the relevant roads, to be 17:00-18:00hrs. The location of the relevant available TII traffic counters within the Metropolitan Area is presented in Figure 6.1.

Figure 6.1: Relevant TII Traffic Counters within Cork Metropolitan Area



The spreadsheet model has included all 18 control points, the locations of which reflect TII traffic counter locations in the Metropolitan Area as illustrated in the preceding Figure 6.1. In the baseline model, the following parameters (all relating to the network peak hour) have been established for each of these points:

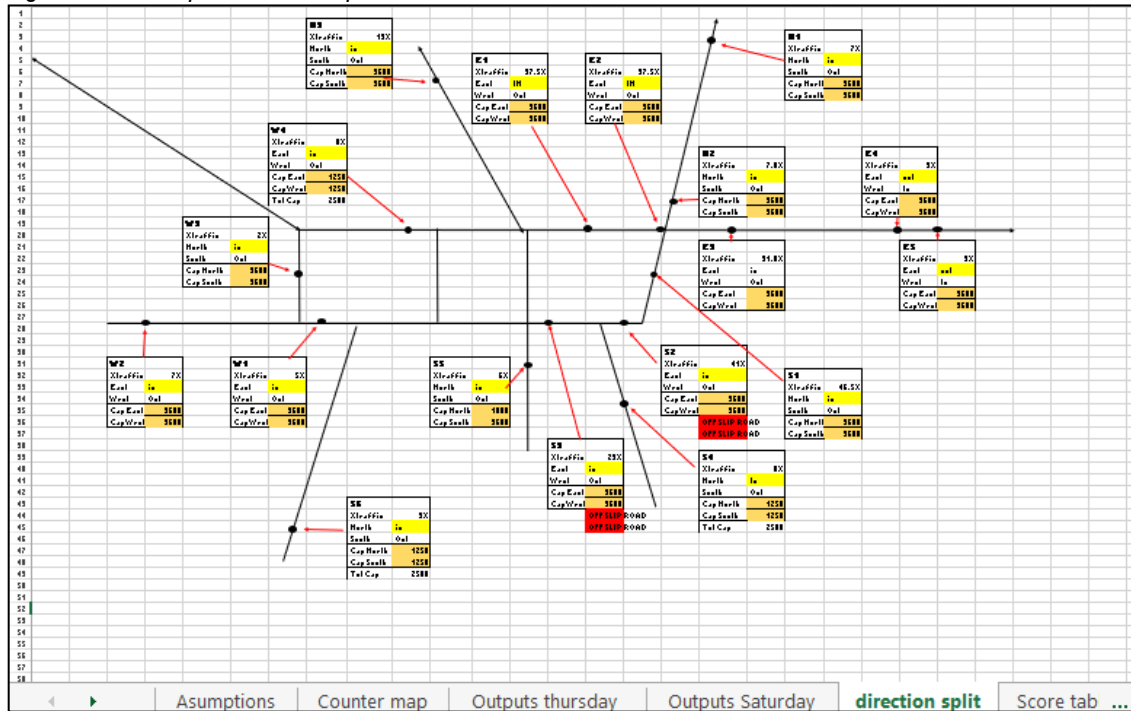
- 2023 (proposed YoO) background traffic flow (per direction);
- 2038 (YoO+15) background traffic flow (per direction); and
- Capacity (per direction for dual carriageway roads).

Based on the above, the following further parameters were calculated:

- 2023 background Ratio of Flow to Capacity (RFC), per direction for dual carriageway roads; and
- 2038 background RFC (also per direction for dual carriageway roads).

An example screenshot presenting the model's input panel has been included as Figure 6.2 below.

Figure 6.2: Transport Model's Input Panel Screenshot



To assess the impact of the proposed development on the traffic conditions on the strategic roads, the baseline model was expanded by adding the following parameters relating to each of the do-development modelling scenarios:

- 2023 (proposed YoO<sup>5</sup>) development traffic flow (per direction); and
- 2038 (YoO+15) development traffic flow (per direction).

Based on the above, the following outputs were calculated, relating to total traffic including baseline traffic and development traffic):

- 2023 do-development traffic flow (per direction);
- 2038 do-development traffic flow (per direction);
- 2023 do-development RFC (per direction for dual carriageway roads); and
- 2038 do-development RFC (per direction for dual carriageway roads).

Building upon these outputs, the following key performance indicators have been identified, which would allow for the most accurate comparison of the modelling scenarios relating to each respective potential development location:

- development impact on the N40 (Cork South Ring Road);
- development impact on the North City Centre N8 Section;
- development Impact on the Inner-City road network; and
- Overall Traffic Impact Index.

The Overall Traffic Impact Index was developed to provide a single comparison of network-wide development impacts in each of the scenarios, with weighting applied to impact on individual links depending on baseline congestion level on these links. Therefore, the index has been deemed to represent an accurate

5 YoO = Year of Opening

synthetic measure of the scale of traffic increase generated by the proposed ROC development in various locations in the Metropolitan Area, accounting for existing congestion patterns.

### 6.3 Transport Impact Assessment Scenarios

#### 6.3.1 Base Scenario

A do-minimum scenario was developed for the years 2023 (YoO) and 2038 (YoO + 15) to reflect future traffic conditions in the absence of the proposed Cork ROC development. To estimate future traffic volumes at all model control points, TII traffic growth factors<sup>6</sup> have been applied to the 2018 link flow data (from TII traffic counters), accounting for link-specific heavy vehicle proportions at each control point. These factors are presented in Table 6.1 below.

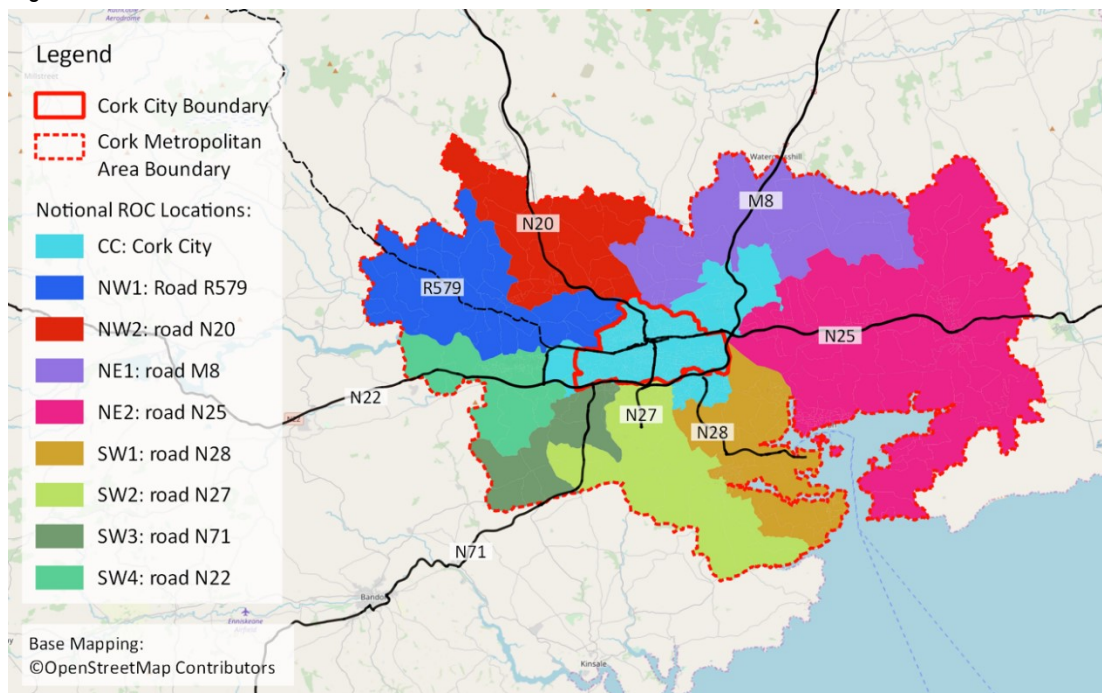
Table 6.1 Traffic Growth Factors

Year	Growth Factor - LV	Growth Factor - HV
2013 – 2030	1.0102	1.0237
2030 – 2050	1.0012	1.0176

#### 6.3.2 Do-Development Scenarios

The do-development scenarios have been developed to represent the impact of the proposed development on traffic on the strategic road network within Cork Metropolitan Area, depending on the selected notional location of the proposed ROC. The range of potential locations have been identified based on the layout of key roads connecting various locations within the catchment with respect to Cork, consistently with the previously developed subdivision of the proposed ROC catchment presented in Section 5.2. These locations are presented within Figure 6.3, which follows.

Figure 6.3 Notional ROC Locations



<sup>6</sup> As per PE-PAG-02017, TII Publications, 2016, central growth forecast for the region South-West

As can be seen in the preceding figure, nine potential notional locations for the ROC have been identified, with the following locations have been excluded:

- CC: Cork City, excluded due to central location, assumed limited suitable site availability and limited reserve capacity on the City’s road network; and
- NW1: Road R579, excluded due to lack of direct national road network access.

Therefore, a total of 7 no. do-development scenarios have been developed, with each of them differing in the distribution of development-related traffic over the model network. The overall development trip generation and broader origin-destination patterns associated with the development have been assumed to be the same for each of the assessed locations, which has been deemed a sufficiently robust approach, given the strategic nature of this assessment. The trip generation and origin-destination patterns have been elaborated upon in Section 6.4, which follows.

## 6.4 Development Traffic Generation and Origin-Destination Patterns

### 6.4.1 Forecast Development Modal Split

The assumptions in relation to the modal split in trips associated with the proposed development, including customer and staff trips, have been informed by the equivalent Kildare Tourist Outlet Village (KTOV) ROC transport patterns due to the expected similarity between these two developments in terms of function, area, catchment size and trip generation. Such KTOV characteristics have been established based on a review of the planning application for an extension to the existing retail outlet centre submitted to Kildare County Council in 2017 (App. Reg. Ref. 17539) and including:

- Results of a traffic survey undertaken on a Thursday (March 2016) and a Saturday (March 2016) illustrating the extent and temporal distribution of traffic flowing in to and out of the site during its opening hours; and
- Results of staff and customer surveys (March 2016) providing information on the modal split and origin-destination patterns in trips accessing KTOV.

The following Table 6.2 provides an overview of the modal split in KTOV-related trips.

Table 6.2: KTOV Visitor/Staff Modal Split

Mode	% Share in Visitor Trips	% Share in Staff Trips
Car (Driver or Passenger)	No information provided directly, assumed 95%	85%
Public Transport	5%	5%
Non-Motorised	No information provided directly, assumed <1%	10%
Other		

As it is expected that the customer trips will represent the vast majority of all trips associated with the proposed Cork ROC development, the modal split has been assumed as per Table 6.3 which follows, informed primarily by current KTOV customer access patterns.

Table 6.3: Assumed Development Modal Split

Mode	% Share
Car (Driver or Passenger)	90%
Public Transport	7%
Non-Motorised	2%
Other	1%

As can be seen in the preceding table, it has been assumed that the proposed retail outlet shopping centre will be accessed primarily by car, with very low share of other transport modes. As such, detailed consideration should be given to transport sustainability at all stages of the development design process, including specifically the selection of a site for the development – this shall be considered within Stage 3 of this study.

### *Vehicular Trip Generation*

The preliminary vehicular trip generation model of the proposed development was informed by the relevant characteristics of the existing KTOV development in relation to the modal split. At the preliminary stage, it has been assumed that both the overall generated trip numbers and the distribution of trips over a day for the proposed development will be the same as the respective values for KTOV.

It is noted that the trip numbers set out within this section include only vehicular trips associated with a retail outlet shopping centre, including individual customer vehicles, shuttle buses in addition to a low number of deliveries taking place during the period between 07:00-19:00hrs. Deliveries occurring outside of these hours have been excluded due to lack of data, however it is envisaged that their impact on the overall demand on the adjacent road network would be negligible.

Key parameters of the assumed proposed development trip generation characteristics have been set out in Table 6.4, which follows.

*Table 6.4: Development Vehicular Trip Generation Parameters*

	<b>Thursday (Typical Business Day)</b>	<b>Saturday (Typical Non-Business Day)</b>
Overall daily trips	4,370	6,540
Peak hour time	15:00-16:00	14:00-15:00
Peak hour departures	220	330
Peak hour arrivals	270	490
Overall peak hour trips	490	820

Detailed temporal trip distribution over a Thursday (treated as a typical business day) and a Saturday (treated as a typical non-business day) has been presented within the following Figures 6.4 and 6.5 respectively.

Figure 6.4: Thursday Arrivals and Departures Profile

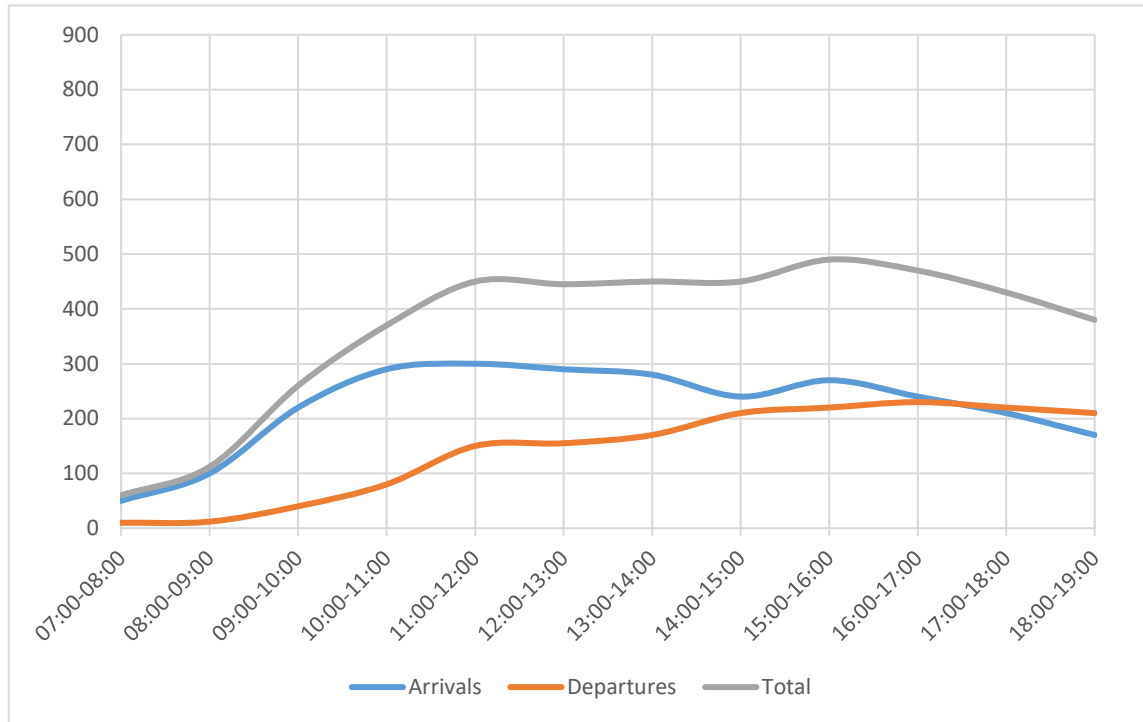
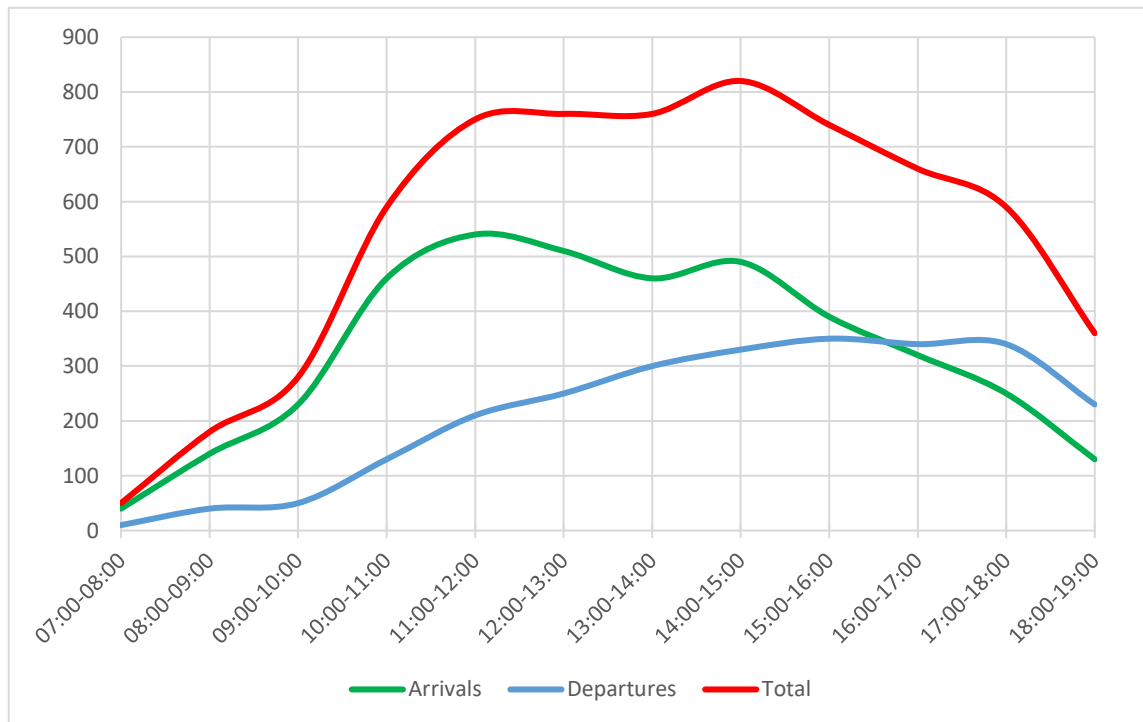


Figure 6.5: Saturday Arrivals and Departures Profile



The following observations can be made based on the above-presented trip generation figures:

- Peak development-related traffic flows will occur on non-business days, with the overall trip number on a Saturday higher by almost 50% that the equivalent value for a Thursday.
- Proposed development will generate relatively little traffic on business days before 09:00hrs and therefore is forecast to have little impact on general network traffic volumes in the morning commuter peak.
- On business days, the development is expected to generate a relatively constant flow of circa 400-500 trips (inbound and outbound) per hour over the period between 11:00-19:00 hours, with peak trip generation of 490 trips occurring between 15:00-16:00hrs. Therefore, it is expected that the traffic impact of the development during the evening commuter peak will be more pronounced, compared to the morning peak.
- On non-business days, the development-related traffic volume is forecast to rise significantly after 10:00hrs and stay above circa 600 trips per hour (inbound and outbound) over the period between 11:00-18:00hrs, with peak traffic generation of 820 trips occurring between 14:00-15:00hrs.

#### 6.4.2 Origin-Destination Patterns

To enable a comparative transport impact assessment of the notional locations of the proposed Cork ROC, it was necessary to translate the established population distribution pattern within the catchment area into origin-destination patterns. This process was informed by an analysis of the transport-related chapter of the Environmental Impact Assessment for the KTOV extension (Kildare County Council App. Reg. Ref. 17539), which has shown that a significant proportion of visitors access the ROC from population centres in its vicinity, with

- County Kildare alone accounting for 21% of visitors; and
- County Dublin accounting for 35% of visitors.

To reflect the above findings in the analysis, a correction factor was applied to the percentage population distribution within the catchment, reflecting the weighted-average distance and population among all small-areas within each sub-catchment, to obtain the forecast origin-destination pattern in trips to/from the proposed Cork ROC development. The results have been presented in Table 6.5 below, along with the corresponding daily trip numbers calculated based on the overall forecast development trip generation as presented within Figures 6.4 and 6.5.

Table 6.5 Origin-Destination Pattern in Development-Related Trips

Sub-Catchment	Key Road	% Population	% Visitors	Thursday Daily Trips (Departing & Arriving)	Saturday Daily Trips (Departing and Arriving)
NW2	N20	32%	13%	558	835
SW4	N22	17%	7%	300	449
NE2	N25	15%	9%	377	564
Cork City	-	14%	45%	1,967	2,943
NE1	M8	12%	7%	308	460
SW3	N71	5%	3%	152	227
SW2	N27	2%	6%	263	393
SW1	N28	2%	9%	374	559
NW1	R579	1%	2%	73	110
<b>Total</b>	<b>-</b>	<b>100%</b>	<b>100%</b>	<b>4,370</b>	<b>6,540</b>

As can be seen in the preceding table, should the Cork ROC be built in line with the assumptions underpinning this analysis, i.e. within Cork Metropolitan Area, it is expected that Cork City would represent a single most significant source of visitor flows, representing 45% of all trips, with the remaining 55% trips distributed among the remaining sub-catchments. It is forecast that the relative quantum of visitors originating from Cork would decrease if the ROC were built further away from Cork City (i.e. outside of Cork Metropolitan Area) and closer to other large population centres, however detailed quantification of associated change in the trip distribution pattern are outside of the scope of this report.

The assumed trip distribution parameters presented above have been applied in developing the do-development transport impact modelling scenarios, with the approach described in the preceding section.

## 6.5 Cork ROC – Forecast Transport Impact

### 6.5.1 Overview

This sub-section of the report presents the findings of the strategic traffic impact assessment of the proposed ROC, considering a number of potential development locations as illustrated in Figure 6.3. The summary analysis is presented for the development’s assumed year of opening (YoO) of 2023, however similar analysis has been completed for the YoO + 15 (2038) assessment year. The latter analysis has reinforced the findings of the 2023 assessment year, as a result of broadly similar road network characteristics and network constraints. As traffic conditions are more critical on weekdays than at weekends, the summary analysis has primarily focused on the Thursday network peak (17:00-18:00hrs) assessment scenario.

### 6.5.2 Impact on the N40 Cork South Ring Road

The impact of the development on the N40 Cork South Ring Road has been assessed based on the forecast associated increase in the RFC on the N40 section between Dunkettle Interchange and Mahon Interchange during a Thursday peak hour in each of the modelling scenarios. This section of the N40 is noted to be at capacity in the baseline 2023 scenario, with forecast RFC at 90% (northbound) and 87% (southbound). It is also noted that the baseline flows in year 2038 are forecast to exceed capacity, with RFC at 104% (northbound) and 101% (southbound).

The results of the assessment are presented within Table 6.6 below.

Table 6.6: % RFC Increase, Cork South Ring Road

Development Location	N40 Northbound RFC Increase, Thursday Peak Hour	N40 Southbound RFC Increase, Thursday Peak Hour
NE1	2.7%	2.8%
NE2	2.7%	2.8%
NW2	1.3%	1.3%
SW1	2.3%	2.4%
SW2	1.8%	1.8%
SW3	1.8%	1.8%
SW4	1.7%	1.7%

As can be seen in the preceding table, the increase in RFC on the N40 associated with the proposed development ranges from 1.3% to 2.7% (northbound) and from 1.3% to 2.8% (southbound). It is noted that locations in the eastern part of Cork Metropolitan Area perform poorest in this respect due to their location in close proximity to the most congested section of the N40 between the N27 and Dunkettle Interchange.



Consequently, a relatively large proportion of the ROC's visitors coming from various origins would use the N40 en-route to such a development location.

Conversely, locations in the western part of Cork Metropolitan Area perform relatively stronger, as a larger proportion of development-bound traffic would be routed through alternative roads to the N40, in particular through the N8 and the N22. Among these, the location NW2 (associated with the N20 national road) appears the most favourable due to the largest share of the ROC catchment population being able to access the location without using the N40.

Keeping the impact on the N40 at minimum should be an important consideration in siting the proposed ROC, given that the N40 traffic is forecast to exceed capacity even in the baseline scenario. With a very high baseline RFC, any further traffic increase may disproportionately increase the risk of flow breakdowns and affect the level of service.

### 6.5.3 Impact on the North City Centre N8 Section

The impact of the development on the section of the N8 running through the northern part of Cork City Centre, along the River Lee, has been assessed based on the forecast associated increase in the RFC on this section of the road during a Thursday peak hour in each of the modelling scenarios. This section of the N8 (at the point where TII's traffic counters are located) is noted to be significantly below capacity in the baseline 2023 scenario, with forecast RFC at 50% (eastbound) and 39% (westbound), however it is noted to experience significant congestion closer to and through the City Centre. It is forecast that the baseline flows at the analysed location in year 2038 will also remain below capacity, with RFC at 58% (eastbound) and 45% (westbound).

The results of the assessment are presented within Table 6.7 below.

Table 6.7: % RFC Increase, North City Centre N8 Section

Development Location	N8 Eastbound RFC Increase, Thursday Peak Hour	N8 Westbound RFC Increase, Thursday Peak Hour
NE1	2.2%	2.3%
NE2	1.7%	1.7%
NW2	2.5%	2.6%
SW1	0.6%	0.6%
SW2	0.6%	0.6%
SW3	0.5%	0.5%
SW4	0.6%	0.6%

As can be seen in the preceding table, the increase in RFC on the inner-city section of the N8 associated with the proposed development ranges from 0.5% to 2.5% (eastbound) and from 0.5% to 2.6% (westbound). As can be seen in the table above, southern locations SW1, SW2, SW3, and SW4 are forecast to cause less impact, with northern locations, in particular the locations NW2 and NE1, performing significantly worse.

This results from the fact that the ROC located in one of the southern locations would be accessed primarily via north-south corridors (including the cross-city section of the N27) as well as the N40, with comparatively less traffic using east-west corridors. Conversely, the N8 would offer the most suitable access route for a larger quantum of visitors, should the ROC be built in one of the northern locations.

### 6.5.4 Impact on the Inner-City Road Network

The proposed development's impact on the Inner-City Road network has been quantified based on the following two factors:

- forecast % of development traffic originating from Cork City area (45% of the overall development traffic, as per ROC catchment analysis in Section 7.4); and
- forecast % of development traffic non-originating in Cork City, which will be passing through the inner-city area (i.e. the area between the N40 and the N8) en-route to the ROC.

Due to lack of TII traffic counters within the area of interest or other equivalent data, background traffic volumes could not be established for this assessment. Furthermore, examining the distribution of traffic on the complicated road network within Cork City would require more detailed network modelling which is outside the scope of this strategic assessment. For the above reasons, the percentage impact on background traffic volumes on the City Centre road network was not established, however, by forecasting the overall number of development-related vehicle trips passing through the inner city during a Thursday network peak hour, a comparative assessment of the development scenarios was enabled.

The results of the assessment are presented within Table 6.8 below.

*Table 6.8: Development Traffic Increase, Inner-City Road Network*

<b>Development Location</b>	<b>% Development Traffic</b>	<b>Number of Trips, Vehicles per Thursday Peak Hour</b>
NE1	45%	194
NE2	45%	194
NW2	57%	245
SW1	52%	224
SW2	58%	249
SW3	52%	224
SW4	45%	194

As can be seen in the above table, all proposed development locations are forecast to generate a significant number of additional trips through Cork City Centre. Locations NW2, SW1, SW2, and SW3 are forecast to generate some transit trips through the City Centre in addition to trips originating within Cork City area, with the transit trips associated with the remaining locations forecast to use the strategic road network bypassing the central area. However, in all cases the proportion of transit trips constitute a low proportion of the overall number of generated trips, therefore the difference in the individual scenarios' performance is not deemed to be material.

#### 6.5.5 Overall Traffic Impact Index

As noted in Section 6.1, the Overall Traffic Impact Index was developed to provide a single comparison measure of network-wide development impacts in each of the scenarios, with weighting applied to impact on individual links depending on baseline congestion level on these links. Therefore, the index has been deemed to represent an accurate synthetic measure of the scale of traffic increase generated by the proposed ROC development in various locations in the Metropolitan Area, accounting for existing congestion patterns.

Based on the strategic traffic impact analysis, the calculated Overall Traffic Impact Index scores for each of the locations are presented within Table 6.9 below.

Table 6.9: Proposed Cork ROC – Overall Traffic Impact Index

Location	Thursday	Saturday
NW2	19.1	12.6
SW3	27.2	17.5
NE1	29.4	19.1
SW2	32.9	21.8
SW4	30.6	19.6
SW1	28.7	18.8
NE2	35.5	22.3

As can be seen in the above table, location NW2 is forecast to have the lowest overall traffic impact on the strategic road network within Cork Metropolitan Area, with other options performing significantly more poorly. This is associated with two factors:

- Location NW2 is associated with the N20 national road corridor, which serves by far the largest proportion of the overall ROC's catchment population (circa 401k or 32% as per Table 6.1). Therefore, a significant proportion of ROC visitors may access the shopping centre without using other strategic road links, in particular the heavily congested N40.
- Location NW2 may be accessed from the south and southwest via the City's road network or the N22, without using the N40, while traffic from the east and northeast would use N8 link west of Dunkettle Interchange.

As impacts on the most congested sections of the model network have been penalised in calculating the Overall Traffic Impact Factor, compared to impacts on less heavily used links, location NW2 appears more advantageous than the remaining locations, which among themselves perform broadly similarly.

## 7 Strategic Location Assessment and Site Selection

### 7.1 Introduction

This section of the report considers the strategic zone or location assessment having regard to the catchment analysis and the traffic and transport assessment detailed in Section 6. This allows for a strategic sifting of the strategic zones identified in Section 5. This strategic location assessment is based upon catchment size and potential traffic and transport considerations. A multi-criteria analysis is undertaken to inform the assessment.

Once the preferred strategic zones are identified, potential sites are identified for further assessment having regard to a number of criteria.

### 7.2 Strategic Locational Assessment

Within this section of the report, the approach to and findings of a strategic traffic impact of development of the proposed ROC in a series of potential locations within the Cork Metropolitan Area are presented. The preliminary analysis has found distinct differences in relation to the traffic impact of the development depending on the location within the Metropolitan Area within which it is developed.

While traffic impact is a key consideration in the selection of the most appropriate location for the proposed development, it is deemed appropriate that such a decision also be informed by other considerations, which are further explored in the assessment of individual sites. Reflecting national and regional policy to reduce car use and promote alternative modes of transport, sustainability attributes of analysed locations are therefore deemed an important factor. This can be determined by the potential for a location to be served by rail, subject to appropriate site selection within the overall area.

A further consideration relates to the market catchment size, as defined by the forecast population within the unique catchment of the potential ROC development location (in its assumed 2023 year of opening). This represents an indicator of the potential commercial attractiveness of such a development.

The above considerations have been further considered within the context of a multi-criteria assessment (MCA) of potential ROC development locations, the findings of which are presented in Table 7.1 below.

Table 7.1: Multi-Criteria Analysis of Potential Cork ROC Locations

Location	Criteria						Total Score
	Market Catchment		Transport				
	2023 Population	2023 Population Score	Forecast Traffic Index	Forecast Traffic Impact Score	Rail Accessibility	PT Accessibility Score	
NE1	148,536	2.00	29.4	1.50	No	1	1.50
NE2	189,424	2.50	35.5	1.00	Yes	5	2.83
SW1	25,076	1.00	28.7	1.50	No	1	1.17
SW2	30,547	1.00	32.9	1.00	No	1	1.00
SW3	63,543	1.00	27.2	2.00	No	1	1.33
SW4	207,104	3.00	30.6	1.50	Yes (Future)	3	2.50
NW2	400,736	5.00	19.1	3.00	Yes (Future)	3	3.67

As can be seen from the preceding Table 8.10, locations NW2, NE2, and SW4 perform significantly stronger than the remaining locations, having notably higher total scores than all other locations. Their characteristics can be summarised as follows:

- Location NW2 has the largest unique catchment population (circa 401k forecast 2023 population), which is nearly twice that of the next location (SW4). It is also forecast to have the most limited traffic impact on the road network within Cork Metropolitan Area. However, its current accessibility by rail is limited by lack of stations within Cork Metropolitan Area on the railway line running through the area associated with this location. Construction of a station at Blarney/Monard is noted to be proposed in future (accounting for its assigned score of 3).
- Location NE2 has a moderately sized unique catchment population (circa 189k forecast 2023 population) and offers the best public transport accessibility thanks to a number of existing stations located within the associated area and a number of new ones proposed in the future. However, this location is also forecast to have a slightly greater strategic traffic impact of all the assessed locations.
- Location SW4 has moderately sized unique catchment population (circa 207k forecast 2023 population) and moderate forecast traffic impact. The associated area is not currently served by any rail-based public transport, however a light rail line is proposed to connect it to Cork City Centre.
- All remaining locations have smaller unique catchment population and offer no existing or planned rail-based public transport links. Therefore, locations NW2, NE2, and SW4 are carried for further consideration, with the remaining locations excluded from further consideration.

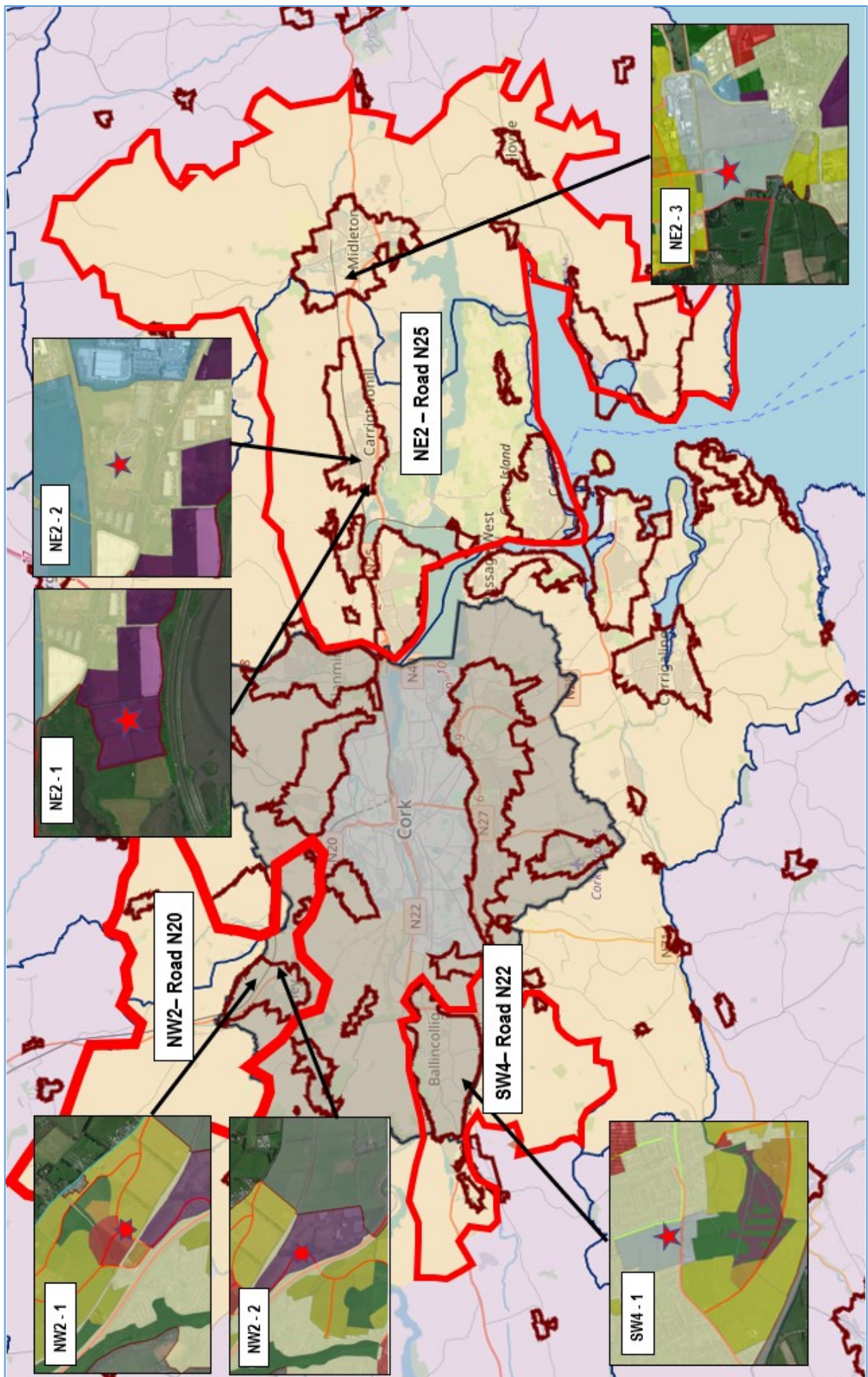
### 7.3 Site Selection

The next stage is to consider specific sites/locations within each of the areas NW2, NE2 and SW4. For the purposes of this assessment, it has been assumed that the gross floor area of the proposed ROC would be c18,000sqm gross. This is equivalent to Phase 1 of the KTOV. Land ownership or availability is not a consideration in this assessment. While the assessment can inform a sequential test undertaken as part of a variation to a development plan or for an individual application, the site selection and consideration does not constitute a sequential test in accordance with the provisions of the Retail Planning Guidelines. Furthermore, the sites selected for assessment are not an exhaustive list and others may also be suitable. However, the number of sites is deemed adequate for the purposes of this study. The following broad considerations were taken into account in the site selection process:

- **Location:** Paragraph 4.11.4 of the Retail Planning Guidelines indicate that the sites immediately adjacent to town/city centres can generate synergies, but if located in an out-of-town can divert a significant amount of expenditure. The Guidelines indicate that the best location is where there are synergies with an existing stand alone smaller or secondary town. Sites falling within existing urban boundaries are therefore considered.
- **Zoning Objectives:** While the study is not constrained by existing zonings, as it may form the basis of a variation to the County Development Plan or relevant LAP, the lands considered are generally zoned for commercial development (enterprise, town centre, etc). No substantial residential zonings are considered, given that this could potentially impact upon the core strategy of the development plan and there is a current demand for housing. The selection of sites already zoned removes any consideration of flood risk or other issues of principle (e.g. impact upon a designated site). It is assumed all sites are serviceable with potable water supply and foul sewerage.
- **Site Size and Suitability:** generally sites/lands of between 8 to 12 ha in size and generally currently undeveloped. The sites may be brown field or greenfield. Sites selected are generally flat.
- **Transport accessibility:** Sites selected are generally accessible to the national road network. Accessibility to existing and planned public transport is also a consideration.

On the basis of the foregoing, six sites were reviewed and these are illustrated in Figure 7.1.

Figure 7.1: Sites/Locations Selected for Assessment



## 8 Site/Location Assessments

### 8.1 Introduction

The previous section identified 6 locations within strategic zones NW2, NE2 and SW4. Only 3 of the 6 locations fell within the County Council area of the CMA and it was only therefore sites/locations NE2-1, NE2-2 and NE2-3 that were brought forward for detailed assessment. Basic assumptions in relation to retail turnover and trade diversion are outlined. It then assesses each of the sites/locations from the perspectives of retail impact, tourism/leisure synergies, traffic and access, and public transport accessibility.

### 8.2 Retail Impact Assumptions

Section 5 of this report adopts a step by step approach to establishing retail potential within the catchment. The final stages of a retail impact assessment involve a further two steps:

- **Step 1:** Estimation of the turnover of the proposed ROC
- **Step 2:** Estimation of quantum trade diversion from existing centres

The retail impact assessment for each site is provided in Appendix III. The cumulative retail impact is the difference in trade of the individual centres between the design year of 2019 and the forecast year of 2023. It is expressed as a percentage change. The impacts of the different locations are illustrated in the tables in Appendix III. As with the estimation of retail potential, the outputs are sensitive to assumptions and inputs. No surveys have been undertaken in relation to this part of the study, as this is beyond the scope of the brief.

#### 8.2.1 Step 1: Estimation of turnover of proposed ROC

An estimate of the turnover of the proposed outlet involves a calculation of the net sales area of development. The ratio of net lettable to net retail sales area is taken as 75% for convenience and comparison as is normal industry practice.

Table 8.1: Net Sales Areas of Proposed Development

Floor Area Category	Floor Area (sqm)
Comparison net lettable (excluding plant)	18,000
Comparison net retail sales area	13,500

Source: MacCabe Durney Barnes

The turnover of the proposed centre is then calculated by multiplying the increased net retail sales areas by the turnover per sqm in the design year of 2023. This yields a turnover of €97,335,000 for the comparison component. The expenditure retail potential floor space demand of 90,000-100,000 sqm can absorb the 13,500sqm proposed.

#### 8.2.2 Step 2: Trade Diversion Assumptions

In the first instance, the existing market share of each of the centres within the catchment is considered. The focus of this study is on the impact upon Cork City Centre and the other district and urban centres in the CMA, including Mahon District Centre & Retail Park, Blackpool District Centre & Retail Park, Douglas District Centre, Wilton, Midleton and Ballincollig. The market share of each of these centres is considered. This forms the basis for establishing trade diversion assumptions. The emphasis is on the higher order comparison shopping and therefore the consideration needs to be given to this in the assessment.

In order to allow for this 'like-for-like' principle, the market shares of centres in the Catchment Area have been weighted and the trade diversions are based on the adjusted market shares of centres taking account

of the weightings. In line with other RIAs, the following weightings have been adopted to inform the trade draw:

- City Centre 2.0
- Urban District Centre 1.5
- Smaller Centres and others Outside the CMA 0.7

Applying this weighting the market share yields the weighted trade diversion detailed in Table 8.2.

Table 8.2: Weighted Trade Diversion Assumptions

Centre	% 2023 Market Share	% Weighted ROC trade diverted from centres
<b>Cork Metropolitan Area</b>		
Cork City Centre	17%	35%
Mahon District Centre	3%	5%
Blackpool District Centre	2%	3%
Douglas District Centre	3%	5%
Wilton	3%	4%
Midleton	2%	3%
Ballincollig	2%	3%
Other CMA	8%	5%
<b>Remainder of Cork County</b>	7%	5%
<b>Other within Catchment</b>	52%	32%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>

Source: MacCabe Durney Barnes

A trade diversion factor which will be taken into account in each assessment for the individual sites is the potential for additional tourism spend over and above expenditure inflows identified in Table 5.4. This potential for additional tourism spend may arise from synergies with other existing nearby attractions or the potential to attract additional spend from outside the catchment, owing to the proximity relative to the boundaries of the identified catchment. So, for example, locations to the south west of Cork City have less potential to draw additional trade from outside the catchment as the boundaries are limited by the sea. Assumptions are made, which vary between 5% and 20% additional ROC tourism related spend. It is also highlighted that this is a notional assessment with an operator not identified. Different operators will have different trade diversion impacts depending upon their retail offer.

### 8.3 Site/Location Assessment

This section appraises the three sites/locations which were selected for further assessment under section 7.3 above. The assessment considers the following

- Retail Impact
- Tourism Synergy
- Traffic & Access
- Public Transport

The various issues are assessed on the basis of weak to strong characteristics



Other detailed consideration of site constraints and suitability are beyond the scope of this study, as it is undertaken for the purposes of assisting the Council in its strategic decision making.



**NE2 – 1**

Criteria	Assessment
Retail Impact	<p>This site is located at the western extremities of the Carrigtowhill urban area. The catchment analysis indicates that it has potential to serve the N25 corridor stretching up to Waterford. It has potential to draw trade from beyond the existing identified catchment, particularly into Waterford in along the M8 corridor. A 15% additional trade draw associated specifically with tourism related expenditure not already identified within the catchment expenditure is applied. This is a reflection of its proximity to other tourist attractions, and also the potential to draw trade from outside the identified catchment.</p> <p>There is a 3.6% trade change and a 0.5% cumulative retail impact upon the city centre. It has limited potential for direct retail related synergies with other retail/leisure uses as it is a distance from the main commercial core and retail park in Carrigtowhill.</p>
Tourism Synergy	<p>There are a number of linked tourist attractions along the N25 corridor. These include the Fota Wildlife Park, Barryscourt Castle and the Midleton Distillery. Cruise tourism is increasing and the area is accessible to Cobh. All of these attractions provide for potential linked trips and tourism synergy, but none are within walking distance.</p> <p>There are no immediately adjacent tourism/leisure attractions that are within walking distance.</p>
Traffic & Access	<p>Direct access to site from the strategic road network (N25) via Cobh Cross Interchange and Killahora Road, the western section of which also provides alternative route to the northern part of Cork City.</p> <p>A desktop review of local traffic conditions indicates that some capacity pressures occur at Cobh Cross Interchange and the section of Killahora Road between the interchange and the site at times throughout the day. As Killahora Road and the link roads within the interchange (incl. the overpass) are single-carriageway roads, local capacity enhancements may be necessary to accommodate traffic associated with the proposed development. Some capacity pressures also noted on the western section of Killahora Road towards Glounthane.</p> <p>Limited pedestrian infrastructure and no dedicated cycle infrastructure available in the site's environs, however Killahora Road included within the Draft CMATS cycle network plan. No resident population within the site's proximity due to the site being located within industrial/warehousing environment. Substantial future residential development in the site's broader environs envisaged, supported by the new station on the Cork-Midleton rail line.</p>
Public Transport	<p>Low frequency bus services currently available on Killahora Road adjacent to the northeast corner of the site, however the closest stop is located ca. 2 kilometres away. Regular bus services to Midleton running adjacent to the site at 10 minutes frequency proposed in Draft CMATS. New bus stops (and supporting pedestrian links to the site) provision would be necessary for the buses to serve the site.</p> <p>The site is located ca. 500 metres from a heavy rail line (Cork to Midleton Line), however no stations are located nearby. Carrigtowhill West heavy rail station proposed within Draft CMATS to be located in the site's broader environs, providing a direct rail connection to Cork City Centre, however the significant distance (ca. 1,000 metres) and pedestrian-unfriendly environment on the way may discourage staff and customer access to a proposed ROC by rail.</p>

**NE2 – 2**

Criteria	Assessment
Retail Impact	<p>This site is located at to the west of Carrigtwohill Industrial Estate. The catchment analysis indicates that it has potential to serve the N25 corridor stretching up to Waterford. It has potential to draw trade from beyond the existing identified catchment, particularly into Waterford in along the M8 corridor. A 15% additional trade draw associated specifically with tourism related expenditure not already identified within the catchment expenditure is applied. This is a reflection of its proximity to other tourist attractions, and also the potential to draw trade from outside the identified catchment.</p> <p>There is a 3.6% trade change and a 0.5% cumulative retail impact upon the city centre. It has potential for synergies with other retail/leisure uses on the adjacent Fota Retail and Business Park. It is however some 2km from the town centre of Carrigtwohill.</p>
Tourism Synergy	<p>There are a number of linked tourist attractions along the N25 corridor. These include the Fota Wildlife Park and the Midleton Distillery. Cruise tourism is increasing and the area is accessible to Cobh. All of these attractions provide for potential linked trips and tourism synergy, but none are within walking distance.</p> <p>The site is immediately adjacent to the Fota Retail and Business Park. There are opportunities for linked leisure and other shopping trips.</p>
Traffic & Access	<p>Direct access to site from the strategic road network (N25) via Cobh Cross Interchange and Killahora Road, the western section of which provides alternative route to northern Cork City.</p> <p>A desktop review of local traffic conditions indicates that capacity pressures occur at Cobh Cross Interchange, in addition to the section of Killahora Road between the interchange and the site at times throughout the day. As Killahora Road and the link roads within the interchange (incl. the overpass) are single-carriageway roads, local capacity enhancements may be necessary to accommodate traffic associated with the proposed development. Some capacity pressures also occur on the western section of Killahora Road towards Glounthane.</p> <p>Limited pedestrian infrastructure and no dedicated cycle infrastructure available in the site's environs, however Killahora Road included within the Draft CMATS cycle network plan. No resident population within the site's proximity due to the site being located within industrial/warehousing environment. Substantial future residential development in the site's broader environs envisaged, supported by the new station on the Cork-Midleton rail line.</p>
Public Transport	<p>Low frequency bus services currently available on Killahora Road adjacent to the site, however the closest stop is located ca. 1.5 kilometres away. Regular bus services to Midleton running adjacent to the site at 10 minutes frequency proposed in Draft CMATS. New bus stops provision (and supporting pedestrian links to the site) would be necessary for the buses to serve the site.</p> <p>The site is located adjacent to a heavy rail line (Cork to Midleton Line), however no stations located nearby. Carrigtwohill West heavy rail station proposed within Draft CMATS to be located in vicinity of the site, providing a rapid, direct rail connection to Cork City Centre.</p>

**NE2 – 3**

Criteria	Assessment
Retail Impact	<p>This site is located between the N25 and the railway line. The catchment analysis indicates that it has potential to serve the N25 corridor stretching up to Waterford and beyond. It has potential to draw trade from beyond the existing identified catchment, particularly into Waterford. A 20% additional trade draw associated specifically with tourism related expenditure not already identified within the catchment expenditure is applied. This is a reflection of its proximity to other tourist attractions and in particular the Midleton Distillery, and also the potential to draw trade from outside the identified catchment.</p> <p>There is a 3.5% trade change and a 0.3% cumulative retail impact upon the city centre. As it falls within the urban boundary of Midleton, it would give a significant boost to the retail spend within the town, resulting in a very significant 89% positive retail impact. It is however some distance from the Main Street and there would be limited opportunity for direct synergies with the retail core of the town. There is a town centre zoning associated Market Green Retail Park lies approximately 300m to the south east of the overall zoned land bank. There is scope for synergies with this existing urban centre.</p>
Tourism Synergy	<p>The other main attraction is Midleton Jameson Distillery, which attracts 123,000 visitors annually.</p> <p>Midleton town itself attracts certain niche retailing with a reasonable provision of bars and restaurants.</p>
Traffic & Access	<p>No direct access to strategic road network (N25), and roads adjacent to the site (Castle Rock Ave) unsuitable for carrying high volume of traffic associated with a potential ROC development at this location. Access from the N25 could be achieved from the Midleton Northern Relief Road to the east of the site via a new link road (depending on the exact site boundaries) and a new access junction.</p> <p>A desktop review of local traffic conditions indicates that capacity pressures occur on the local road network, especially in the PM peak period. It is likely that an upgrade of the N25 interchange (including the overpass), the adjacent Cork Road junction, and a section of Midleton Northern Relief Road would be necessary to accommodate additional traffic associated with a proposed ROC without negatively impacting peak period level of service on the N25 and local road network.</p> <p>Pedestrian and cycle infrastructure available on all major roads to the east of the site (incl. Midleton Northern Relief Road), however not on Castle Rock Ave. No material improvements to the infrastructure within the site's direct vicinity proposed in the current Cork County Development Plan or draft CMATS. No substantial residential development adjacent to the site and limited population within its walking catchment, however the entirety of Midleton is within the site's cycling distance. Substantial future residential development in the site's environs envisaged.</p>
Public Transport	<p>No current or planned bus services available in close proximity to the site, with the closest stops of the Cork-Midleton route located on Cork road, ca. 1 kilometre from the site. Current services are infrequent, however it is proposed to be improved to 10 minutes in the draft CMATS. Route modification would be necessary to serve the site.</p> <p>The site is located adjacent to a heavy rail line (Cork to Midleton Line), however no stations located nearby. Water Rock heavy rail station proposed within draft CMATS to be located adjacent to the northern boundary of the site, providing a rapid, direct rail connection to Cork City Centre.</p>

## 9 Conclusions of Study

### 9.1 Introduction

The conclusions of the study are summarised below and provide an overall assessment of

- Retail need and impact
- The role of tourism and leisure
- Traffic, transport and access
- Potential sites and locations

The conclusions drawn relate to a generic ROC and have been informed by retail and transport assessments.

### 9.2 Retailing

#### 9.2.1 Retail Need

The study indicates that there is scope and comparison retail potential capacity to accommodate a quantum of additional comparison retail floorspace within the CMA and region at 2023. There are issues around the rapidly changing retail environment and the impact, in particular, of online retailing on floor space demand. To fully assess these recent trends on future retail floorspace requirements would require a comprehensive householder survey of expenditure patterns in the CMA. The study illustrates through the Annual Services Inquiry that online shopping continued to hit comparison expenditure available for the high street. The capacity assessment concludes that there is a requirement for between 90,000 and 100,000 sqm of net retail comparison floor area up to 2023 within the wider catchment. The subject proposed development would account for between 13-15% of this demand. There is however only capacity for one such outlet in the CMA.

This indicates need from a planning perspective. There is also market need for the specific form of ROC. As illustrated in the case-studies, there is a wide range of models focusing on different niches in the market. The higher end ROCs tend to focus almost exclusively on fashionwear. However, there are other formats, which place a greater emphasis on a blended offer of fashionwear, food and beverage, other comparison goods, and leisure facilities such as cinemas and music venues. The success, and indeed impact, of the ROC is dependent upon the precise format chosen or proposed. As this study only takes a generic format/model for the purposes of policy and impact assessment, it is not possible to assess a specific operator's model.

Cork City Centre is the principal centre for higher order comparison shopping in the region and this is reflected in its position at the top of the hierarchy. It provides a wide range of higher order fashion outlets ranging from department stores to branded high street stores including Next, Dorothy Perkins and River Island. Cork City Council has indicated vacancy rates of between 9-11% on a number of primary shopping streets. The retail impact assessment for the ROC indicates a cumulative retail impact of between 0.3% and 1.0% depending upon the location of the ROC and the capacity to draw additional tourism expenditure from outside of the catchment. This is a reflection of the relatively modest scale of the ROC (13,500 sqm net sales area) relative to the overall size of Cork City Centre (93,058sqm including pipeline). This would indicate a negligible impact upon the trading conditions of the city centre. The impact is lessened with distance from the city centre. If the pipeline development is deducted, the percentage impact will be greater.

The impacts are dependent upon strictly controlling the nature and type of goods sold to ensure that they are end of season and not in direct competition with high street traders in the city centre. It should also be noted that the larger the ROC, the greater the impact and potential for providing an alternative destination with associated local leisure activities. This assessment is only undertaken on the basis of a ROC of limited

but viable size. The trade impacts are limited by growth in productivity of floor space. If these do not materialise over the period, there will be a greater impact, but still limited in extent. On this basis a ROC should not have an adverse impact upon the vitality and viability of the Cork City Centre, particularly for those locations more distant from the main retail core of the city.

Other district centres and suburban centres such as Mahon, Blackpool, Douglas, Wilton and Ballincollig and the other main stand-alone town of Midleton generally offer middle order comparison retailing. As such the impact on them is less than for the city centre and they are generally not in direct competition with a ROC. The tables in Appendix III illustrate that there is no direct impact when the design year and opening year are compared. Midleton, which is identified as a potential location, would directly benefit if selected as a location. This is reflected in the allocation of trade associated with the ROC.

A ROC will draw trade from a wide catchment and this is illustrated in the catchment analysis. The impact over the wider area is dissipated and reflected in the weightings applied to the trade diversion. The ring towns within Cork would fall within the same category as the urban centres in the CMA, offering middle order comparison retailing. The ROC would not therefore be in direct competition.

### 9.3 Tourism and Leisure Synergy

Maximising the opportunities for synergies with tourism attractions is important in maximising the economic benefits and minimising any impact upon the vitality and viability of existing centres, particularly Cork City Centre. The profile of the operator cannot be considered in the assessment undertaken as part of this study, but undoubtedly the type of operator will determine the attractiveness or otherwise to tourists visiting the area.

ROC formats can also have significant synergies with leisure, restaurants, cafes. Such leisure activities are often associated with resident, as opposed to tourism, expenditure and therefore there is greater potential for trade diversion and impact upon existing centres. The impact upon trade diversion will be limited where the synergies relate to already existing leisure facilities, rather than the creation of significant new leisure accommodation directly associated with the ROC itself.

### 9.4 Traffic and Transport

From the transport planning perspective, ensuring high quality accessibility to the ROC by various modes of transport should be considered essential in order to enable easy access from various locations within in its large catchment, while encouraging and promoting sustainable mobility. To achieve this, the ROC should be well connected to the strategic road network by road links with sufficient capacity to accommodate the increased traffic demand even during peak times, while also being served by multiple high-frequency public transport services. Integration of the ROC within or adjacent to an existing or proposed public transport hub would offer the strongest opportunities to maximise the role of public transport in serving both customer and staff travel demands.

In terms of staff travel demand, reducing travel distances in the first place by locating the development close to an urban area with a large residential population (offering the potential for staff to walk or cycle) and serving the remaining commuting demand by public transport are two key sustainable transport objectives. To enable sustainable access by staff, a site should ideally be well linked to broader pedestrian and cycle infrastructure serving its local catchment.

In respect to the above characteristics, each of the assessed sites brings an individual set of advantages and challenges, whose details have been set out in tabular format within Section 8.3.

## 9.5 Sites and Locations

A total 3 sites/locations were assessed. These were selected for the purposes of assessing the impact of a ROC in traffic and retailing terms. The assessment indicated a varying performance of the potential location/sites. Consideration of those to be brought forward and reflected in the development plan will be a matter for the statutory planning process. The Retail Planning Guidelines advocate a sequential approach to testing of appropriate sites. The Vision and Assessment Criteria outlined in the next section considers how the various relevant factors can be considered in any assessment of alternative locations.

## 10 Vision and Development Criteria

### 10.1 Vision

*Facilitate an innovative competitive comparison retail outlet centre serving a regional catchment that is sustainably located, which provides synergies with tourism attractions and existing urban centres, avails of existing and planned public transport, does not give rise to traffic congestion, and does not have any adverse effects upon the vitality and viability of existing retailing centres.*

### 10.2 Assessing Retail Outlet Centre Proposals

- i) The sequential test in accordance with the Retail Planning Guidelines (2012) will be applied. It must be demonstrated through the sequential test that the most appropriate site is selected having regard to the Vision, as outlined above.
- ii) A retail impact assessment, which fully complies with Annex 5 of the Retail Planning Guidelines will be required. In setting out the retail impact, the focus should be on how the scheme will add/detract from trade, vitality and viability of existing urban centres and the role which tourism expenditure will play.
- iii) The applicant must demonstrate that the products sold will not be in competition with those currently on sale in typical city/town centre locations. The range of goods to be sold in the proposed development shall be limited solely to end-of-season/end-of-line comparison goods that are not concurrently available for sale in High Street locations. The sale of toys, bulky goods or convenience goods, hot food takeaway, uses within Class 2 (services) of the Planning and Development Regulations will not be considered.
- iv) The planning authority will consider including conditions in any grant of permission and entering into a section 47 agreement relating to the regulation and use, which will cover matters including:
  - a. Limit retailer type, area for floorspace for sales, and pricing at least 30% below recommended retail price (RRP) to ensure that only appropriate outlet retailers can trade from the centre.
  - b. Removal of exempted development rights in relation to a change of use within use Class 1 to limit the range of goods sold.
  - c. Remove exempted development rights in relation to the amalgamation of units, or the insertion of mezzanine floors.
  - d. Prevent the sale of convenience retail goods, with the exception of the ancillary sale of confectionary and food and beverage related gifts or within a restaurant/café for consumption on the premises.
  - e. Restrict traders already located in Cork City Centre from occupying the ROC unless the retailer agrees to retain their presence in the City Centre for a minimum of five years.
  - f. Restrict hours of opening.
  - g. Apply bond and financial provisions to allow the planning authority to monitor the conditions/agreement.

## Appendix I: Summary of Written Submissions

Consultee	Issues Raised
Cork City Council	<ul style="list-style-type: none"> <li>• Key requirement of study is to assess the impact upon the vitality and viability of Cork City Centre and other centres in the CMA.</li> <li>• The assessment should have regard to existing retail conditions in the CMA, the impact of an ROC on a metropolitan area and impact on high end retailing in the City Centre.</li> <li>• Potential impacts also need to include analysis of health of existing centres, an assessment of retail trade and investment, trade diversion and online retailing.</li> <li>• The study should reflect section 2.3 of GRP 2012 which states that there is a presumption against out-of-town retailing which adversely impacts town centres and generates excessive traffic on the national road network.</li> <li>• A greater emphasis needs to be placed on sustainable modes of transport rather than just the private car (with reference to CMATS proposals).</li> <li>• If Part B of the study proceeds, the location should have due regard to section 4.11.4 of the GRP 2012.</li> <li>• Given vacancy levels and need for investment in the city centre, it is considered that a ROC in CMA is premature.</li> <li>• Cork City Council would not support any ROC which would negatively impact existing centres, including the city centre.</li> </ul>
National Transport Authority	<ul style="list-style-type: none"> <li>• Suitable locations should be informed by the Cork Metropolitan Area Strategic Plan (MASP) and the Transport Strategy for the Cork Metropolitan Area (CMATS), which are in preparation.</li> <li>• The provisions of the GRP 2012 point to a general presumption against large out-of-town retail centres close to the national road network and promote access to retailing by non-car modes</li> <li>• The impact upon existing transport infrastructure needs to be considered having regard to its primary purpose.</li> </ul>
Transport Infrastructure Ireland	<ul style="list-style-type: none"> <li>• The Spatial Planning and National Roads Guidelines 2012 emphasise that inappropriate forms of development should not erode the benefits of the national road network.</li> <li>• The provisions of the GRP 2012 point to a general presumption against large out-of-town retail centres close to the national road network and promote access to retailing by non-car modes.</li> <li>• The impact upon existing transport infrastructure needs to be considered having regard to its primary purpose.</li> <li>• Section 2.7 of the Spatial Planning and National Roads Guidelines 2012 seeks to protect the capacity of interchanges in zoning and other development proposals.</li> <li>• The impact upon existing transport infrastructure needs to be considered having regard to its primary purpose.</li> </ul>
Little Island Business Association	<ul style="list-style-type: none"> <li>• Supports a ROC in the CMA. It could complement Cork City Centre and would be supported by other sectors including food, hospitality and tourism.</li> <li>• Customers travel a long distance, often staying overnight.</li> <li>• Suggests suitable locations are on the eastern side of Cork at Fota Retail Park/Carrigtwohill, Carrigtwohill/Midleton or Little Island.</li> </ul>



Consultee	Issues Raised
Cork Business Association	<ul style="list-style-type: none"> <li>• Cork City Centre is the primary retail centre for Cork. Currently, the retail sector is extremely fragile.</li> <li>• Concern is expressed at the possible retail impact upon the City Centre. It will be difficult to attract high end retailers to the City Centre.</li> <li>• Branded retailing in a ROC would threaten independent retailers.</li> <li>• Transport infrastructure is also in need of investment.</li> <li>• In depth analysis of the health, vibrancy and future retail offer in the City Centre, Ballincollig, Mahon, Midelton, Carrigaline etc. is required.</li> <li>• Vacancy rates need to be further considered.</li> <li>• In section 2.3 of the GRP 2012 there is a presumption against large out of town shopping centres which generate significant volumes of traffic on the national road network and potentially impact junctions.</li> <li>• There is no provision for a ROC under the Metropolitan Cork Joint Retail Strategy 2015.</li> <li>• Proposals for a ROC are premature pending the adoption of new County Development Plan.</li> <li>• The Association will actively canvas against any development which affects the vitality and viability of other centres in the CMA.</li> </ul>
Blarney Castle Estate Partnership	<ul style="list-style-type: none"> <li>• Blarney Castle Estates is an international attraction with 500,000 visitors annually</li> <li>• Consideration needs to be given to the likely impact on overall tourist numbers in Cork.</li> <li>• The study should consider other comparable developments which link ROCs with other tourist attractions.</li> <li>• Consideration needs to be given whether such centres increase or decrease dwell times in other attractions.</li> <li>• It has the potential to have adverse cumulative traffic impacts.</li> <li>• It is likely to have an adverse visual impact.</li> <li>• A ROC could undermine the vitality and viability of the city centre.</li> </ul>

## Appendix II: Top 15 UK Outlet Centres

Rank	Scheme	Gross Floor Area (Sqm)	Manager / Owner
1	Resorts World Birmingham	49,982	Genting / Realm
2	Gunwhard Quays	41,295	Landsec
3	Cheshire Oaks Designer Outlet	32,748	THRE / McArthurGlen
4	London Designer Outlet	32,516	Quintain / Realm
5	The Galleria Outlet Centre	30,658	Landsec
6	Gloucester Quays Designer Outlet	28,939	Lifestyle Outlets
7	Livingston Designer Outlet	27,035	Balckstone / Realm
8	Lowry Outlet	25,548	Lifestyle Outlets
9	Swindon Designer Outlet	23,226	THRE / McArthurGlen
10	York Designer Outlet	23,040	Aviva / McArthurGlen
11	Junction 32 Outlet Shopping Village	22,854	Landsec
12	Bridgend Designer outlet	22,390	M&G / McArthurGlen
13	Freeport Braintree Outlet Shopping Village	18,581	Landsec
14	Bicester Village	18,581	Value Retail
15	Clarks Village	18,116	Landsec



## **Appendix III: Trade Diversion and Retail Impact for Sites Assessed**

**Comparison Spending Diversion & Impact NE2 – 1 & NE2 - 2**

Centre	2019 Turnover Existing & Permitted	2023 Turnover Existing & Permitted	2023 Proposed Trade Diversion from Each Centre	2023 Market Share	% Weighted ROC Trade diverted from existing centre	2023 Turnover of Each Centre After New Development	% 2023 Trade Change of Each Centre	Difference Between 2019 and 2023 after new development	Cumulative Retail Impact
<b>Cork Metropolitan Area</b>									
Cork City Centre	€668,556,000	€688,612,680	€ 23,680,453	14%	24%	€664,932,227	-3.6%	-€3,623,773	-0.5%
Mahon District Centre & Retail Park	€149,422,000	€153,904,660	€ 3,969,429	3%	4%	€149,935,231	-2.6%	€513,231	0.3%
Blackpool District Centre & Retail Park	€101,207,000	€104,243,210	€ 2,688,587	2%	3%	€101,554,623	-2.6%	€347,623	0.3%
Douglas District Centre	€153,311,500	€157,910,845	€ 4,072,754	3%	4%	€153,838,091	-2.6%	€526,591	0.3%
Wilton	€127,156,000	€130,970,680	€ 3,377,928	3%	3%	€127,592,752	-2.6%	€436,752	0.3%
Midleton	€109,601,000	€112,889,030	€ 2,911,575	2%	3%	€109,977,455	-2.6%	€376,455	0.3%
Ballincollig	€97,428,000	€100,350,840	€ 2,588,197	2%	3%	€97,762,643	-2.6%	€334,643	0.3%
Other CMA	€409,066,000	€421,337,980	€ 4,942,219	9%	5%	€513,730,761	18.0%	€104,664,761	25.6%
<b>Remainder of Cork County</b>	€359,070,000	€369,842,100	€ 4,338,182	8%	4%	€365,503,918	-1.2%	€6,433,918	1.8%
<b>Other within Catchment</b>	€2,496,947,200	€2,571,687,026	€ 30,165,428	53%	31%	€2,541,521,598	-1.2%	€44,574,398	1.8%
Other ROC tourism spend from outside catchment			€ 14,600,250		15%				
<b>TOTAL</b>	<b>€4,671,764,700</b>	<b>€4,811,749,051</b>	<b>€97,335,000</b>	<b>100%</b>	<b>100%</b>	<b>€4,826,349,301</b>			

Note: An additional 15% ROC related tourism spend is assumed for these two locations.

### Comparison Spending Diversion & Impact NE2 – 3

Centre	2019 Turnover Existing & Permitted	2023 Turnover Existing & Permitted	2023 Proposed Trade Diversion from Each Centre	2023 Market Share	% Weighted ROC Trade diverted from existing centre	2023 Turnover of Each Centre After New Development	% 2023 Trade Change of Each Centre	Difference Between 2019 and 2023 after new development	Cumulative Retail Impact
<b>Cork Metropolitan Area</b>									
Cork City Centre	€668,556,000	€688,612,680	€ 22,287,485	14%	23%	€666,325,195	-3.3%	-€2,230,805	-0.3%
Mahon District Centre & Retail Park	€149,422,000	€153,904,660	€ 3,735,933	3%	4%	€150,168,727	-2.5%	€746,727	0.5%
Blackpool District Centre & Retail Park	€101,207,000	€104,243,210	€ 2,530,434	2%	3%	€101,712,776	-2.5%	€505,776	0.5%
Douglas District Centre	€153,311,500	€157,910,845	€ 3,833,180	3%	4%	€154,077,665	-2.5%	€766,165	0.5%
Wilton	€127,156,000	€130,970,680	€ 3,179,226	3%	3%	€127,791,454	-2.5%	€635,454	0.5%
Midleton	€109,601,000	€112,889,030	€ 2,740,306	2%	3%	€207,483,724	45.6%	€97,882,724	89.3%
Ballincollig	€97,428,000	€100,350,840	€ 2,435,950	2%	3%	€97,914,890	-2.5%	€486,890	0.5%
Other CMA	€409,066,000	€421,337,980	€ 4,651,500	9%	5%	€416,686,480	-1.1%	€7,620,480	1.9%
<b>Remainder of Cork County</b>	€359,070,000	€369,842,100	€ 4,082,994	8%	4%	€365,759,106	-1.1%	€6,689,106	1.9%
<b>Other within Catchment</b>	€2,496,947,200	€2,571,687,026	€ 28,390,991	53%	29%	€2,543,296,035	-1.1%	€46,348,835	1.9%
Other ROC tourism spend from outside catchment			€ 19,467,000		20%				
<b>TOTAL</b>	<b>€4,671,764,700</b>	<b>€4,811,749,051</b>	<b>€97,335,000</b>	<b>100%</b>	<b>100%</b>	<b>€4,831,216,051</b>			

Note: An additional 20% ROC related tourism spend is assumed for this location.