

Metropolitan Cork Joint Retail Study

April 2013



Cork City Council



Cork County Council



Midleton Town Council



Cobh Town Council

CHAPTER 1: INTRODUCTION

1.1 Introduction

- 1.1.1 The Retail Planning Guidelines (RPG's) for Planning Authorities (2012), issued by the Department of the Environment, Community and Local Government, require Local Authorities to prepare retail strategies and policies for their areas and to incorporate these where appropriate into their development plan. The guidelines note that certain development plans and local area plans must be informed by joint or multi authority retail strategies which should assess retail activity and demand needs that transcend planning authority boundaries. The guidelines specifically identify that Cork City and County Councils should prepare a joint retail strategy.
- 1.1.2 John Spain Associates were commissioned in August 2012 by Cork City Council and Cork County Council to prepare a joint retail study for Metropolitan Cork. It is envisaged that the joint retail study for the planning authorities in the City and County will be incorporated into the review of their respective development plans commencing in 2013.
- 1.1.3 For the purpose of the joint retail study, the Metropolitan area is as defined in the Cork Area Strategic Plan (see figure 1.1 below). The principle objective of both authorities is to promote future growth in appropriate locations in the area known as Metropolitan Cork, particularly Cork City itself, but also in the areas to the north and east of the city that are served by the suburban rail network.
- 1.1.4 The previous joint retail study undertaken in 2008 was for the entire City and County area. Since then there have been significant changes in the retail sector influenced primarily by the economic downturn. This document provides guidance and policies for retail development at a strategic level and aims to ensure a co-ordinated, sustainable approach to the assessment and provision of retail development in the Metropolitan area. In particular the retail study examines ways to secure the future of the City Centre as the primary retail centre for the South West Region whilst at the same time enhancing the attractiveness of the suburban centres in the City and the Metropolitan town centres. The document provides a retail hierarchy for the Metropolitan Area and sets out a series of principles and recommendations for the City, the suburban district centres and the Metropolitan Towns.
- 1.1.5 It is envisaged that the retail study will form an integral part of Cork City Council's and Cork County Council's overall vision for the development of the Metropolitan Area over the period of the forthcoming Cork City and Cork County Development Plans. It will inform the policies of these plans in respect of retail development and ensure that such policies are based on the most up to date information. The study will also assist in the consideration of forthcoming planning applications.

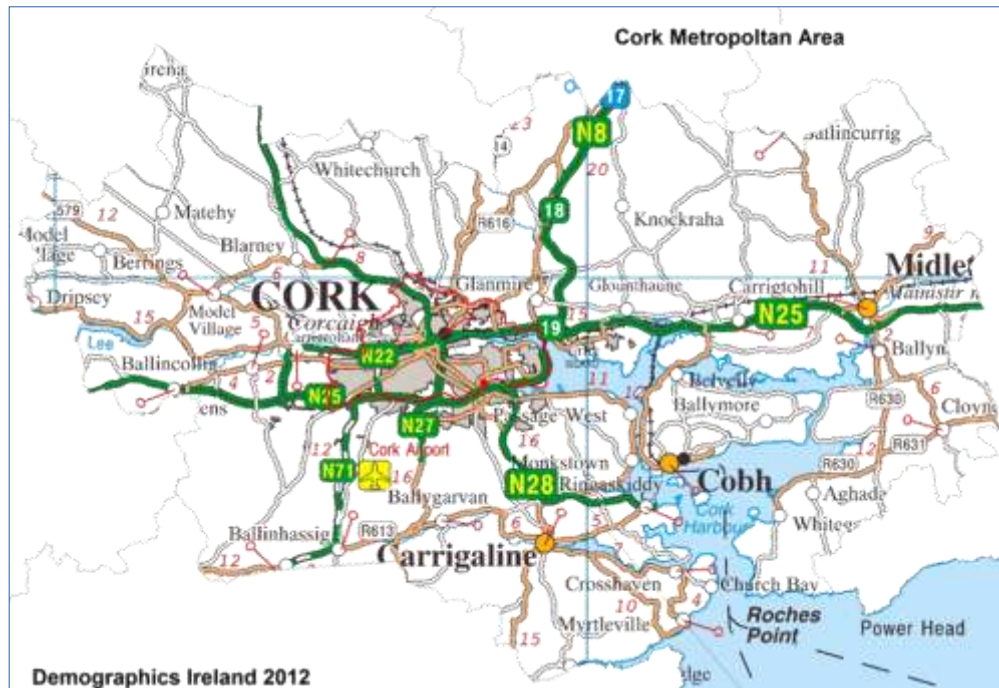


Fig. 1.1: Study Area

1.2 The Purpose of the Retail Study

1.2.1 The purpose of the retail study is to implement the objectives of the Retail Planning Guidelines 2012.

1.2.2 The retail study considers in particular the following:

- A review of national, regional and local planning policy documents for the Metropolitan Area.
- Identification of new and emerging retail trends, best land use planning practice and market shifts and their potential implications on retailing in the Metropolitan Area.
- Population growth based on the 2011 Census and targets set out in the Regional Planning Guidelines for the South West Area.
- Household and shoppers surveys undertaken by Demographics Ireland to identify existing shopping patterns within the Metropolitan Area.
- Floorspace study which includes analysis of the extent and type of existing convenience, comparison and retail warehousing floorspace in the Metropolitan Area.
- Identification of rates of vacancy within each urban centre in the Metropolitan Area.
- Consultation with key stakeholders.
- Health check assessments for the key towns in the Metropolitan area (including Passage West, Cobh, Ballincollig, Blarney, Carrigaline, Carrigtwohill, Glanmire and Midleton) and the City Centre (including the suburban centres of Mahon, Wilton, Blackpool and Douglas) in accordance with the guidance set out within the Retail Planning Guidelines 2012.
- Confirmation of the retail hierarchy and the role of centres in the Metropolitan Area.

- Definition of the boundaries of the core retail area for the key urban centres in the Metropolitan area with mapping to illustrate same.
- An assessment of the requirement for additional retail floorspace in the Metropolitan area having regard to anticipated population growth and consumer spending up to 2022.
- Strategic guidance on the location and scale of retail development (including convenience, comparison and retail warehousing) in the Metropolitan Area up to 2022.
- The identification of opportunity sites for development which could strengthen retail activity within the City Centre and Metropolitan Towns.
- Preparation of policies and action initiatives to encourage the improvement of the City Centre and town centres in the Metropolitan Area. Identification of criteria for the assessment of future retail proposals within the Metropolitan Area..
- Developing of a monitoring system to enable the City and County authorities to monitor and update the retail strategy.

1.3 Approach

1.3.1

The approach taken in the formation of the review of the retail study, undertaken between August 2012 and December 2012 included the undertaking of baseline survey and research. This comprised the following components:

Policy Analysis: National, regional and local policies were reviewed in the context of the retail study with particular reference to the retail hierarchy and existing and emerging development plan policies.

Retail Trends: A review of recent retail trends was carried out and an assessment made of their impact and influence on the retail profile and function of the Cork Metropolitan Area.

Economic Context: Retail expenditure is influenced by the economic performance of the area. The economic context for the analysis was therefore established.

Retail Hierarchy and Identification of Core Retail Areas: The structure and context the City Centre and of each town in the Metropolitan Area was analysed to determine the core retail areas and growth of core retail areas.

Survey: A new comprehensive floorspace study was undertaken to establish existing levels of retail provision in the study area. A household survey was undertaken to establish the existing shopping patterns in the Metropolitan Area. This also provided clarity on the extent of leakage to other competing centres and highlighted shoppers concerns regarding the quality and quantum of existing retail floorspace. A shopper's survey was also undertaken in the principle retail centres in the County to ascertain consumer's opinions on the quality of the retail offer in that centre. The survey results also identify the competing centres to Cork.

Qualitative Survey: A qualitative health check survey was carried out in order to assess the current level of vitality and viability of the key centres in the Metropolitan Area to assess their strengths and weaknesses in retail terms. Opportunity sites for retail development and expansion were also identified.

Quantitative Analysis: Population analysis, expenditure analysis, turnover analysis and overall quantitative analysis has been carried out.

1.4 Preparation of Retail Study

1.4.1 Following on from the analysis set out above, the study then sets out clear policies, actions and a vision for the future for Cork Metropolitan Area. The study will consider the development potential of the Metropolitan Area and the preparation of policies to promote the development of a distinctive retail identity for the City Centre and the key urban centres in the Metropolitan Area.

1.4.2 The qualitative and quantitative analysis and other inputs as outlined above are fundamental in the capacity assessment of the need for future convenience and comparison floor space in the Metropolitan Area. In brief, the assessment comprises the following principal elements:

- Population forecasts in accordance with the growth rates set out within the Regional Planning Guidelines for the South West area.
- Establishing convenience and comparison expenditure based on up to date information from the Central Statistics Office.
- Establishing the extent of existing floor space and its turnover.
- Identification of the extent of unimplemented “pipeline” and existing vacant floorspace within the Metropolitan Area.
- Analysing the above data to determine the potential convenience and comparison spend available to support new retail floor space to 2022.

1.4.3 The final component of the study is to determine the retail strategy for Cork Metropolitan Area to 2022. The report concludes with recommendations regarding the criteria and actions for assessing future retail development in the Metropolitan Area.

1.5 Structure of the Report

1.5.1 The structure of the report is as follows:

Chapter 1: Introduction

Chapter 2: Policy Context

Chapter 3: Economic Context and Current Trends in Retailing

Chapter 4: Survey Approach and Analysis – Floorspace Study, Vacancy Study, Shoppers Survey and Household Survey

Chapter 5: Health Check Assessment

Chapter 6: Quantitative Assessment – The Need for Future Floorspace

Chapter 7: Retail Hierarchy and the Future Distribution of Floorspace.

Chapter 8: Policies and Actions.

Chapter 9: Criteria for Assessing Future Retail Development.

Chapter 10: Monitoring Programme

Appendices 1-6

CHAPTER 2: POLICY ANALYSIS

2.1 Introduction

2.1.1 The purpose of this chapter is to review the relevant spatial and sectoral policy documents which will influence the future development of the retail sector in the Cork Metropolitan Area.

2.1.2 In this section, we identify the current and emerging plans, policies and proposals that are relevant to the Retail Study in the following order:

- National;
- Regional; and
- County and Local.

2.2 National Level

2.2.1 A number of national level plans, strategies and guidelines are of particular relevance to the shape and direction of the Study. These are:

- National Spatial Strategy 2002-2020;
- Retail Planning Guidelines for Planning Authorities (2012)
- Development Plan Guidelines for Planning Authorities (2007)
- Smarter Travel – A Sustainable Transport Future – A New Transport Policy for Ireland 2009 – 2020.

National Spatial Strategy 2002-2020

2.2.2 The National Spatial Strategy (NSS) was published on 28th November 2002. The key objective of the National Spatial Strategy is to provide an overarching planning framework for the Country and to result in the achievement of more balanced regional development.

2.2.3 The NSS provides for increasing urbanisation of the population and achievement of critical mass in large multi-faceted town centres. The NSS designated Cork City as a ‘Gateway’ for the south west region. Cork is also located on the Atlantic Gateway Corridor initiative which aims to counterbalance the development of Dublin.

2.2.4 The NSS states that *“strengthening the critical mass of the existing gateways of Cork, Limerick/Shannon, Galway and Waterford, to complement Dublin’s successful national spatial role offers the most immediate prospects of establishing more balanced patterns of development over the next few years”*. It is recognised that Gateway’s such as Cork have considerable potential for expansion and further development to achieve a more balanced form of regional development.

2.2.5 The NSS also recognises that *‘Cork has the most immediate potential to be developed to the national level scale required to complement Dublin’*. The NSS states that the Cork Area Strategic Plan (CASP), which will be discussed below, *“sets a positive agenda for proceeding*

in this direction, given the emphasis on enhancing Cork's capabilities as a metropolitan, business friendly, public transport based and physically attractive city"¹.

2.2.6 The NSS acknowledges that towns in Metropolitan Cork such as Midleton, Cobh and Carrigaline need to be promoted as self sustaining towns. It is noted that these towns will benefit from proximity to Cork City whilst building upon their employment and service functions. Whilst outside of the study area, the NSS also identifies Mallow as a hub town and that it is a centre with a strong retail base and important retail destination for its local catchment.

Retail Planning Guidelines (2012)

2.2.7 The Retail Planning Guidelines (2012) were adopted by the Department of the Environment, Community and Local Government in April 2012 and replace the previous Retail Planning Guidelines (2005).

2.2.8 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.

2.2.9 The Guidelines emphasise that enhancing the vitality and viability of city and town centres in all their functions through sequential development is 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 planning national roads / motorways.

2.2.10 The Guidelines have 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.

2.2.11 The Guidelines emphasise that in order to ensure proper planning and sustainable development, retail development and activity must follow the settlement hierarchy of the State, including the various Gateway and Hub town locations identified in the NSS 2002-2020, the Regional Planning Guidelines and the Core Strategies of Development Plans.

2.2.12 The Guidelines also provide specific guidance for the content and role of Development Plans. It is stated, *inter alia*, that:

- Development Plans must set out clear evidence based policies and objectives in relation to retailing in a discrete section of the Plan.

¹ NSS, pg. 44, 2002

- Joint or multi-authority retail strategies, where required, will guide the preparation of retail policies and objectives in the relevant Development Plans.
- The need for any additional retail warehousing should be carefully assessed in view of the significant levels of recent provision and potential impacts on vitality and viability of city and town centres.
- At a minimum, City and County Development Plans must:
 - State the elements of their settlement hierarchy in line with the relevant regional planning guidelines and their core strategy;
 - Outline the level and form of retailing activity appropriate to the various components of the settlement hierarchy in that core strategy;
 - Define, by way of a map, the boundaries of the core shopping areas of city and town centres and also location of any district centres;
 - Include a broad assessment (square metres) of the requirement for additional retail floorspace only for those plans in the areas covered by a joint or multi-authority retail strategy;
 - Set out strategic guidance on the location and scale of retail development to support the settlement hierarchy, including where appropriate identifying opportunity sites which are suitable and available and which match the future retailing needs of the area;
 - Identify sites which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area;
 - Include objectives to support action initiatives in city and town centres; such as
 - Mobility management measures - that both improve accessibility of retail areas while aiming to develop a pedestrian and cyclist friendly urban environment and vibrant street life;
 - Public realm interventions - aimed at improving the retailing experience through high quality civic design, provision of attractive street furnishing, lighting and effective street cleaning/business improvement district type initiatives; and
 - Identify relevant development management criteria for the assessment of retail developments in accordance with these guidelines.

2.2.13 In relation to joint or multi authority retail strategies such as the current study, the guidelines states that the central objectives of such strategies are to identify:

- The broad (sq.m.) requirement for additional retail floorspace development over the plan period in the overall area to support the settlement hierarchy;
- The retail floorspace requirements both quantity and type by constituent planning authorities; and
- Broad guidance as to location and function of retail activity, taking account of the policy objectives in Chapter 2 and the relevant settlement hierarchy.

2.2.14 Some other key guidance set out in the Retail Planning Guidelines, as relevant to the Cork Metropolitan area, includes the following:

- Cork City is identified as a metropolitan retail centre in the retail hierarchy of the state. It is stated that Cork provides a range of high order comparison shopping which is largely unmatched in the smaller cities and towns.
- 3,500 sq. m. cap on convenience retail floorspace;
- 6,000 sq. m. cap on retail warehouse floorspace. Proposed exceptions to the 6,000 sq. metre retail warehouse cap may be considered on the merits of individual development applications in the five NSS Gateway cities including Cork if they meet the specific locational criteria set out in the Retail Planning Guidelines;
- The need for any additional retail warehousing should be carefully assessed in view of the significant levels of recent provision and potential impacts on vitality and viability of city and town centres.

Development Plan Guidelines for Planning Authorities (June 2007)

- 2.2.15 These Guidelines were adopted under Section 28 of the Planning and Development Act 2000, as amended.
- 2.2.16 The Guidelines include guidance on the preparation of the retail planning strategy to be included in a Development Plan.
- 2.2.17 It is stated at Paragraph 3.13 that, in accordance with the Retail Planning Guidelines all City and County development plans are required to incorporate the following retail planning policies:
- *“Confirmation of the retail hierarchy including the role of urban centres of differing sizes, and the size of the main town centres.*
 - *Definition in the development plan of the boundaries of the core shopping areas of cities and towns.*
 - *A broad assessment of the requirement for additional retail floorspace.*
 - *Strategic guidance on the location and scale of retail development.*
 - *Preparation of policies and action initiatives to encourage the improvement of town centres.*
 - *Identification of criteria for the assessment of retail developments”.*
- 2.2.18 The Guidelines also advise that *“the retail hierarchy should be clearly linked to and evolved from the settlement hierarchy envisaged in the settlement strategy elements of the development plan. It should take into account the needs of consumers in terms of facilitating a competitive retail environment, while promoting development at locations which are readily accessible, particularly by public transport, and in forms which support multi-purpose trips on the same journey”.*
- 2.2.19 It is further noted that paragraph 4.55 states that within the retail strategy, it is recommended that planning authorities should adopt policies of promoting the re-utilisation of suitable redundant or obsolete structures, and where appropriate, the use of protected structures for housing, retail or other purposes.

Smarter Travel – A Sustainable Transport Future – A New Transport Policy for Ireland 2009 – 2020

2.2.20 This document is designed to show how we can reverse current unsustainable transport and travel patterns and reduce the health and environmental impacts of current trends and improve quality of life. The document outlines that key to achieving this will be better integration of land use and planning and transport policies. A key target of the document is that future population employment growth will predominantly take place in sustainable compact forms which reduces the need to travel for employment and services. A key action of the guidelines is a general restriction on the development of out of town retail centres except in exceptional circumstances and consideration of a similar requirement that parking charges be introduced for most existing centres.

2.3 Regional Level

Regional Planning Guidelines for the South West Region 2010-2022

2.3.1 The Regional Planning Guidelines (RPG's) provide an overall spatial planning framework for the region to 2022 taking the NSS objectives to a regional level and supporting the strengthening of the Cork Gateway.

2.3.2 It is stated in the guidelines that Cork City is the second largest city in the State and the Greater Cork Area (CASP area), with a population in 2006 of 377,596, is one of the most dynamic areas of modern Ireland in terms of education, research and development, internationally traded services and high-technology manufacturing. The region is the European headquarters for many multinational corporations in the electronics, software, food pharmaceutical, bio-pharma and associated sectors.

2.3.3 It is acknowledged in the guidelines that over the past 10 years, development around the main Cork Gateway has experienced a "doughnut effect", whereby a higher rate of population growth has occurred in villages and rural areas instead of within the main urban areas. It is noted that this unsustainable pattern of development has resulted in higher commuting patterns and greater demands on infrastructure development and the need for other services outside of main urban areas.

2.3.4 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 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 Ballyvolane and Mahon.

2.3.5 The population targets set out in the Guidelines reflect a significant growth of 127,500 persons in the south west between 2010-2022, the second highest level of growth in the state. It is stated that the population of the South West region will grow from 621,130 in 2006 to in the order of 795,000 persons in 2022. Cork City is allocated a target population of 150,000 by 2020.

2.3.6 With regard to retail, the Guidelines note that the region has a well developed retail component. It is stated that Cork City Centre is the primary comparison shopping centre of the region and forms the central core of any future retail study. 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 the supporting population in line with the requirements of the Retail Planning Guidelines.

2.3.7 The Guidelines acknowledge that Cork City Centre has benefited from considerable investment in urban regeneration (both infrastructure and new buildings) and this economic development together with the environmental upgrade of Cork City Centre will assist in its promotion as the primary location for retail, services and cultural events in the region.

2.4 Local Level

2.4.1 At the City and County level, the plans and strategies, which have an influence, or will have an influence on the Retail Study, are:

- Cork Area Strategic Plan (CASP) 2001 – 2020
- Cork Strategic Retail Study March 2008
- Cork City Development Plan 2009-2015
- Cork County Development Plan 2009 - 2015

Cork Area Strategic Plan (CASP) 2001-2020

2.4.2 The Cork Area Strategic Plan (CASP) was originally published in 2001 and provides a vision and strategy for the development of the Cork City Sub-Region up to 2020. CASP covers an area determined by a journey time of about 45 minutes from Cork City and encompasses a spatial zone that includes principal towns such as Youghal, Fermoy, Mallow, Macroom, Middleton, Bandon and Kinsale. The strategy is intended to provide guidance as to the general direction and scale of growth, so that the sub-region can provide a high quality of life and opportunity for all its citizens over the next 20 years. Its main focus is the implementation of an integrated land use and transportation strategy. The CASP Update, dated July 2008, adheres to the key goals for the CASP Area which were adopted as part of the 2001 plan and delivers an updated strategy which provides for a significant enhancement in economic growth and accommodates a greater population than originally envisaged. It acknowledges that the city population fell due to declining household size and slower than anticipated growth in Docklands, while population in the ring towns and rural areas was higher than anticipated. The CASP update aims to refocus growth in line with CASP objectives as well as identifying locations for expanded growth.

Cork Strategic Retail Study March 2008

- 2.4.3 Cork City Council and Cork County Council jointly commissioned consultants to prepare the Cork Strategic Retail Study (March 2008). The study provides guidance on the projected demand for retail floorspace in Cork City and County over the period 2007-2020.
- 2.4.4 At the heart of the study is a hierarchy of retail locations that forms the basis for determining the quantum and location of new retail development. The study notes that Cork City Centre is the primary retail centre in the County and the region and should continue to be the focus for most comparison retail development in the south of the Country. It is acknowledged that the City Centre is undergoing a major expansion of its retail offer with new developments opened at the Guy's site, Cornmarket Street and at St. Patrick's Street/Emmet Place. The study also notes that there is planning permission for a range of new convenience and comparison floorspace at Grand Parade, Lavitt's Quay, Merchants Quay, St. Patrick's Quay and at the Capitol Cinema site. The study states that these developments will significantly enhance the retail offer of the city centre and help to strengthen its position in the retail hierarchy.
- 2.4.5 In relation to the four existing District Centres the study states that they are characterised by medium or large foodstore anchors, together with a range of comparison shopping and the study states that some of the centres contain a wide range of good quality comparison shopping, similar to a town centre. The overall strategy for the District Centres, which includes Blackpool, Douglas, Wilton, Mahon and a proposed new centre at Ballyvolane, is to provide for the *'development of mixed use urban centres to include retail, with urban design and access improvements'*. The retail study seeks to control the expansion of the suburban district centres so that planned development in the City Centre and the Metropolitan towns can be achieved. In particular it notes that Mahon Point should remain much at its present size and that additional development should be located in the remaining district centres together with additional districts centre provision in the north east and north-west of Cork in the form of upgrades to existing neighbourhood centres.
- 2.4.6 With regard to the outer Metropolitan area the study notes that Midleton, Blarney, Ballincollig and Carrigaline are to the main focus for expansion.
- 2.4.7 The study sets out the future retail requirements of the City and County. It is noted that up to 2013, committed convenience and comparison goods development roughly matches projected expenditure growth, although it is acknowledged that there is a clear short term need to bring forward more foodstore development in the Outer Metropolitan Area.

Cork City Development Plan 2009-2015

- 2.4.8 The City Development Plan was formally adopted in April 2009. It sets out the context for future development in the City and suburbs until 2015 and beyond; through development objectives, development control standards and policies for the protection of the built and natural environment of Cork City. The original Overall Strategy included in Chapter 2 has been replaced with a Core Strategy, to accord with the requirements of the Planning and Development Amendment Act 2010. The Core Strategy was adopted on the 27th of June 2011.

- 2.4.9 Chapter 4 contains the Retail Strategy for the City which aims to provide a strategy for the development of retailing in Cork City. The Plan includes the following policy:

Policy 4.1 Role of the Retail Strategy

“To include the Cork Planning Authorities Joint Retail Strategy in current and future development plans together with appropriate objectives that will secure its implementation.

To have regard to the Retail Planning Guidelines for Planning Authorities, in determining planning applications for retail development.”

- 2.4.10 The plan sets out the retail hierarchy for the city and it is noted that this forms the basis for determining the quantum and location of new retail development. Cork City Centre forms the first tier of the hierarchy, followed by the Cork City Docklands District Centre and Cork City Suburban District Centres of Blackpool, Douglas, Wilton, Ballyvolane and Mahon Point in the second tier.

- 2.4.11 The Cork City neighbourhood centres in the north and south docks as well as the suburban neighbourhood centres of Bishopstown, Bishopstown Court, Tory Top Road/Curragh Road, Hollyhill, Blackrock Hall (Ballinaure), Clashduv Road / Togher, Mount Agnes Road, Avenue de Rennes, Skehard Road, Blackpool Village, Mayfield and The Lough form the third tier. The fourth tier comprises the metropolitan towns of Ballincollig, Blarney, Middleton, Carrigaline, Monard, Carrigtwohill, Glanmire, Tower, Little Island and Passage West. The fifth and sixth tiers comprise the ring towns and the county towns.

- 2.4.12 With regard to the City Centre the plan notes that it is the main venue for higher order comparison goods and fashion goods. The plan states that this dominant position of the City Centre be protected in terms of comparison goods and particularly higher order comparison goods. The plan notes that retailing will be developed in the Docklands area in accordance with the needs of the expanding population of this area. It is the policy of the Council to:

“To recognise the need for Cork City Centre to both expand and improve the quality of the retail experience offered to meet its planned role as a retail centre of international importance.”

- 2.4.13 With regard to district centres, key policies include:

“To acknowledge the importance of Cork Suburban District Centres in providing a wide range of both convenience and comparison shopping in locations close to significant centres of population.

To recognise the need to carefully control the future expansion of suburban District Centres so that they progressively develop as mixed use urban centres and that the planned development of Cork City Centre and the Metropolitan Towns can be successfully achieved.

To ensure an even distribution of comparison floorspace in the city suburbs by allocating new floorspace (as shown in Table 4.3) at the ratio of 40/60 to the northside / southside

respectively. No suburban centres will have a greater amount of comparison floorspace than the current largest centre (Mahon), which will not grow significantly over the period of the strategy. On the northside there is scope for consolidation of Blackpool as a well as additional provision in the north east through upgrading Ballyvolane to a district centre and in the north west of the city, either through upgrading an existing neighbourhood centre or development of a new district centre. On the south side there is scope for expansion of comparison retailing in Douglas and an opportunity for remodelling and expansion of Wilton District Centre, so that they evolve into mixed-use centres with high quality design.”

2.4.14 The plan notes the importance of neighbourhood centres in meeting local needs primarily for convenience shopping, local service provision and also for a limited range of comparison goods.

2.4.15 With regard the Metropolitan towns, the plan states that the Metropolitan towns of Midleton, Blarney, Ballincollig and Carrigaline should be expanded. In particular as Midleton and Blarney are located on the suburban rail project, there will be a need for further retail development in these towns to meet the needs of new residents and workers.

2.4.16 Under Policy 4.12, the location and scale of additional retail floorspace is set out:

“To acknowledge Cork City Centre as the primary retail centre in the County and the focus for comparison retail development.

Within Cork City suburbs, the available floorspace should be distributed around the district centres, in order to avoid imbalance of provision.

Within the Metropolitan Cork Towns, the available floorspace should be distributed among the main centres at Ballincollig, Midleton and Carrigaline, whilst also allowing for new floorspace at the principle neighbourhood centres, in order to avoid and imbalance of provision.”

2.4.17 With regard to retail warehouse development, the plan states that the preferred location for all such development is within the core shopping areas although it is acknowledged that such development may be more suitable at edge of centre locations or at district centres. The strategy expresses concern that poorly planned retail warehouses outside the city and its suburbs could seriously undermine the sometimes fragile comparison element in many town centres.

Cork County Development Plan 2009 - 2015

2.4.18 The Cork County Development Plan 2009 is also informed by the joint retail study undertaken in 2008. The plan notes that the key settlements for expansion are Midleton, Blarney, Ballincollig and Carrigaline. It is recognised that Midleton and Blarney are located on the suburban rail project and so are focal points for new higher density housing and employment development. Therefore, there will need to be further retail development in these towns to provide for the needs of new residents and workers. It states:

“Midleton has a specific role in serving a wider catchment area and there are ambitious projects being considered in and around the central area that should be promoted. In Blarney, whilst recognising the tourism retail potential of the town, there will be an extension to the town at Stoneview, which will have an additional retail centre. Ballincollig and Carrigaline are large towns which have expanded significantly in recent years and there are further opportunities for growth in both. ”

2.4.19 With regard the other settlements, the plan mirrors the guidance set out in the Retail Strategy. In relation to Monard, it is noted that new retail development should be provided at a scale appropriate to the population. It notes that Carrigtwohill is already a focus for retail warehousing but that new town centre retailing will be required to meet the planned housing and employment developments. With regard to Cobh, it is noted that this is a major population centre and requires the development of adequate convenience and comparison shopping. The tourism potential of the town is also acknowledged. Passage West has development potential at the old dockyard area and Glanmire has a suburban centre that can be expanded incrementally in line with population needs.

2.4.20 Under Policy Econ4: it is an objective of the Council to acknowledge the importance of the Metropolitan Towns in providing a wide range of both convenience and comparison shopping in locations close to significant centres of population.

2.4.21 With regard to the distribution of future floorspace, the County Plan states that within the Metropolitan Cork Towns, the available floor-space should be distributed among the main centres as identified in the Retail Hierarchy.

2.4.22 The County Plan specifically recognises the importance of town centres as commercial and cultural centres with a diverse range of functions and attractions. The plan states that in order to maintain the role of town centres, new development must enhance their attractiveness and safety for pedestrians and reinforce the diversity of uses throughout the day and evening. The plan also acknowledges the importance of developing and maintaining a compact core where retail and commercial uses are close enough to each other to benefit from each other’s pedestrian flows.

2.4.23 In this regard under policy Econ 4-14 it is stated:

“It is an objective to promote the development of town & neighbourhood centres as the primary locations for retail and other uses that provide goods or services principally to visiting members of the public. Core shopping areas will form the primary focus and preferred location for new retail development, appropriate to the scale and function of each centre.

It is an objective to recognise that where it is not possible to provide the form and scale of development that is required on a site within the core area, consideration can be given to sites on the edge of the core area.”

2.5 Conclusion

- 2.5.1 A review of National Policy identifies that Cork City is a designated Gateway and thus is to be the focus of continued infrastructural investment in order to ensure it has a critical mass of population and services commensurate with its status. Retailing is an important factor in ensuring that the City has the necessary attractions and facilities for its residents. It is a critical element in ensuring that the city is an attractive place to live, work and invest in and to maintain its vitality and vibrancy.
- 2.5.2 The consolidation of retailing in the City is also important from a sustainable planning and development perspective as the City Centre is the most accessible location in the Metropolitan Area and is well served by public transport infrastructure. The consolidation of retailing in the City Centre also ensures that there is potential for commercial synergy and linked trips. It is also important from a tourism perspective.
- 2.5.3 At a regional level the primacy of the City Centre is acknowledged. However, it is also noted that the planned growth in metropolitan towns to complement growth in the City will be important to ensure that the Gateway can offer a broad choice of locations for sustainable development.
- 2.5.4 The City and County Development Plan set out retail guidance that is consistent with the joint retail study undertaken in 2008. These Plans seek to encourage appropriate retail development in the City Centre and town centres, where suitable lands are available. In this regard, the Development Plans seek to implement the policies and objectives at the national and regional level in terms of encouraging the development of the various centres in accordance with their position in the retail hierarchy and promoting the sequential approach to retail development.
- 2.5.5 At a local level there is a further suite of local area and action plans. These set out policies and objectives regarding retail development at a local level. Reference to these documents will be made, where relevant, throughout the study document.

CHAPTER 3: ECONOMIC CONTEXT AND RETAIL TRENDS

3.1 Introduction

- 3.1.1 In carrying out the retail study for the Metropolitan area, it is important to assess the economic context, as relevant to retail, at a national, regional and local level as current and projected economic growth levels can have a significant effect on factors such as expenditure change and thus on the nature and quantum of retail development that occurs.
- 3.1.2 This section provides an overview of the current national economic context and the impact that this is having, and is likely to continue to have on the retail sector. Following this, a number of emerging retail trends which are likely to have a key impact on the retail sector in the short to medium term are set out.
- 3.1.3 Section 3.4 of this chapter outlines specific trends that are emerging in the convenience, comparison and retail warehouse sectors. Where relevant, this chapter will refer to international trends in retailing. In particular, reference will be made to emerging trends and patterns in the retailing sector in the UK.
- 3.1.4 Sources for this section include the Central Statistics Office (CSO) publications, most notably the Census of Population and the Retail Sales Index, ESRI publications such as Quarterly Economic Commentary, the National Spatial Strategy, the Retail Planning Guidelines (2012), and the Regional Planning Guidelines for the South West Region (2010 – 2022), and other relevant publications as referenced throughout this chapter.

3.2 Relevant National Retail and Socio-Economic Context

- 3.2.1 The Irish economy experienced an unprecedented period of growth from the early 1990's to 2007. According to the ESRI², unprecedented economic growth saw the level of Irish real GDP double in size over the course of a little more than a decade.
- 3.2.2 However, the pace of economic growth began to decelerate in the second half of 2007. In 2008, output fell for the first time since 1983, and the recession deepened in 2009. Ireland's economic difficulties have been compounded by the global difficulties in financial markets which commenced in 2007.
- 3.2.3 With the decline in economic growth, came a decline in employment. From a peak of 2.1 million persons employed in 2007 and averaging a low unemployment rate of 4.5% in 2007, unemployment, as of August 2012, now stands at 14.7%.
- 3.2.4 According to the ESRI, the downturn post 2006 saw the public finances move into significant deficit at an alarming rate³, with the General Government Deficit reaching 14% of GDP in 2009. The ESRI Quarterly Economic Commentary of Summer 2012 estimates that the

² ESRI Current Trends, http://www.esri.ie/irish_economy/

³ http://www.esri.ie/irish_economy/

general government deficit is -8.3% of the GDP in 2012 and is forecast to be at -7.5% in 2013.

3.2.5 The latest ESRI Quarterly Economic Commentary (Autumn 2012) estimates that the Irish economy returned to modest growth in 2011, with real GDP increasing by 1.4%. GDP growth for 2012 is expected to be 1.8%, compared to 1.6% for 2011. It further estimates that GDP will increase by 2.1 % in 2013, and GNP will increase by 0.7%. It is expected that growth will slow significantly in 2012. GDP in 2012 is expected to grow by 1.4%, whereas GNP will decrease by 0.2% as export growth will not be enough to counterbalance weak domestic demand and government austerity.

3.2.6 The Department of Finance Monthly Economic Bulletin of November 2012 states that real GDP decreased by 1.1% during the second quarter of 2012, following 2.1% and 2.8% expansions in the previous two quarters. The Monthly Economic Bulletin also reflected the ESRI findings (Quarterly Economic Commentary of Autumn 2012) stating that *“real GDP returned to positive growth in 2011, increasing by 1.4%. It is expected that the economy will continue to grow modestly in 2012 with the pace of expansion strengthening over the forecast horizon”*.

3.2.7 The Central Bank of Ireland, in their Quarterly Bulletin (Q4, October 2012) estimate that GDP growth is projected to moderate to 0.5% in 2012, with GNP forecast to contract by 0.4%. The Central Bank expects a pickup in growth in 2013, to around 1.7% in GDP terms and 0.7% in GNP terms. These projections are based upon some recovery in external demand in 2013, alongside a gradual stabilisation in the domestic economy.

3.3 Key Emerging Trends in Retailing

3.3.1 Set out below are a number of key emerging trends in retailing, under the following headings:

- Impact of recession
- Online retailing
- Town centre management and Business Improvement District Schemes (BIDS)

3.3.2 These are considered to be the key factors that will influence retailing over the short to medium term. Section 3.4 sets out other retail trends that are specific to convenience, comparison and retail warehouse retailing.

Impact of Recession

3.3.3 It is inevitable that as a result of the general economic downturn, there will be an impact on retail sales. The onset of the economic recession in late 2007 has led to a very significant slowdown in the physical development of the retail sector in the country. The effect of the economic conditions on retailers is evident in the increase in the presence of vacant and derelict sites in town centre locations. There has been no new speculative retail construction completed in Ireland over the last 12 months.

3.3.4 It is unlikely that there will be any new significant large retail pipeline floorspace delivered either in Ireland or in the UK in the near future. Availability of funding for such developments are now extremely rare even where there is strong retailer intent. In a UK context, there was pipeline permission, as of October 2011, for 3.18 million square metres of retail development. It is estimated that only 4% of this is currently under construction⁴. In many instances, the failure to attract an anchor store, or the withdrawal of an anchor store from a scheme, can be a significant factor.

3.3.5 In the UK, average vacancy is estimated at 14.4% in July 2012. Whilst there are no corresponding figures for Ireland, it is considered that vacancy rates are likely to be on a par if not higher in certain centres. Whilst vacancy rates in healthy city and town centres can be lower, vacancy rates in smaller towns which experienced investment during the past decade can often be much higher, particularly where recent town centre developments have been constructed but have failed to let due to the economic climate. For example, vacancy in Ballincollig is high, attributable mainly to the high level of vacancy at the recently completed Old Quarter development. Vacancy rates throughout the settlements in the Metropolitan Area are detailed in Chapter 4 of this retail study.

3.3.6 The latest CSO Retail Sales Index figures (September 2012) indicate that retail sales volumes, excluding the motor trade, are stabilising although showing an increase of 0.6% in September 2012 from August 2012. It also shows an annual increase of 1.4%. Such short term increase in retail sales volumes may be misleading and unsustainable over a longer period, and may be attributable to short term reactions, such as the transition from analogue to digital television and the associated demand for Saorview technology.

3.3.7 Figure 3.1 below illustrates trends in retail expenditure as set out in the Retail Sales Index 2005 – 2012. It is noteworthy that whilst the category of ‘All Business’ continues to decline in 2012, the category of ‘All Businesses Excluding Motor Trades’ appears to be stabilising and a slight increase between 2011 and 2012 is observed within the category of ‘All Businesses Excluding Motor Trades and Bars’.

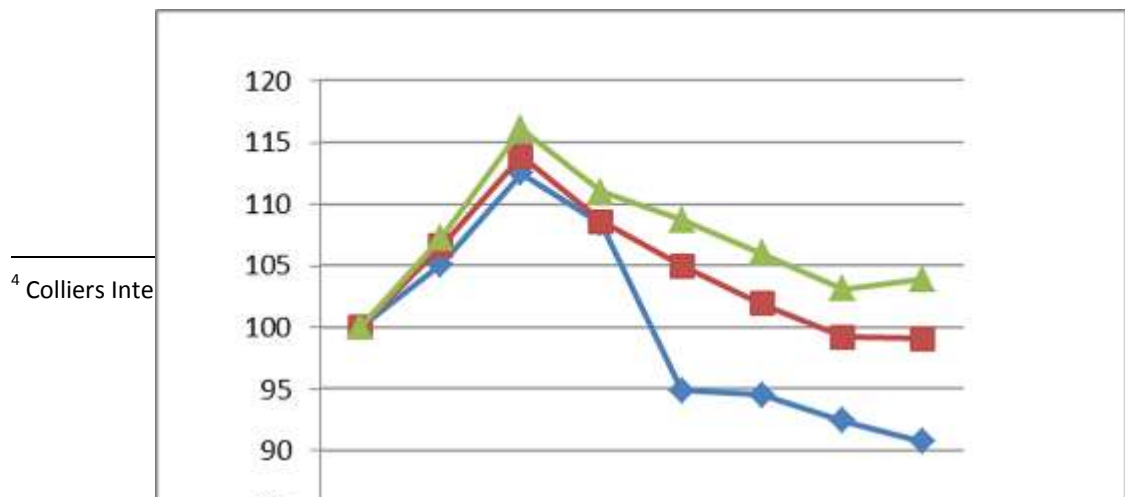


Figure 3.1: Retail Expenditure Trends, 2005 - 2012

- 3.3.8 It is noteworthy that the level of increase/decline in retail sales has varied significantly between different categories of retail business since 2005. There has been a significant decline in the volume of sales in the bulky goods sector. This is illustrated, for example, by a decrease of 37.9% in the furniture and lighting sales since 2005 and a decrease of 35.1% in the hardware, paints and glass category since 2005.
- 3.3.9 There is no composite figure for comparison goods, but it is clear that comparison goods expenditure on clothing and footwear is still well ahead of the level in 2005. The volume of sales index for department stores and clothing, footwear and textiles have also increased since 2005 to 107.4 (an increase in 7.4% since 2005) and 115.3 (an increase in 15.3% since 2005) respectively.
- 3.3.10 However, an accurate analysis of trends would focus upon the performance post the start of the recession in circa 2007. As can be seen from Figure 3.1, since circa 2007, retail expenditure trends have continued to decrease for all businesses, albeit with a certain degree of levelling out from 2009 onwards. Continuing inflation is likely to have an ongoing negative effect on retail sales. The ESRI expects inflation to increase over the second half 2012 and forecasts an annual average rate of inflation of 1.9% in 2012, remaining at around this level in 2013⁵.
- 3.3.11 Convenience retail has generally been the exception and has sustained a level of growth. This is illustrated in Figure 3.2 below by reference to the performance of the 'food business', with growth increasing between 2005 and continuing with a steady performance through to 2012. This is particularly evident in the discount retail sector where retailers such as Aldi and Lidl continue their store roll-out programme. In a UK context, CBRE, an Irish real estate

⁵ ESRI Quarterly Economic Commentary (Autumn 2012)

consultancy, estimate that foodstore floorspace in the pipeline has grown by 57% since September 2007⁶.

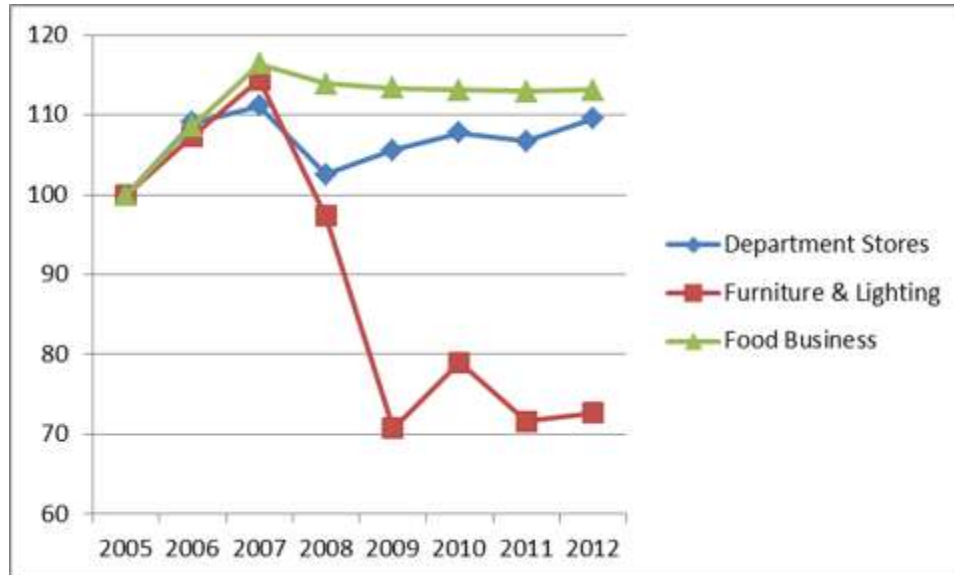


Figure 3.2: Retail Expenditure Trends in Certain Retail Sectors, 2005 - 2012

- 3.3.12 Against this context, the retail market has shown signs of evolving to meet market demands and to increase attractiveness, evidenced for example by the integration of leisure and retail uses and the increase in retail unit size to create the required economies of scale to compete effectively in an increasingly competitive market. These issues are discussed in further detail below in Section 3.4. In general terms, increased price competition has become a key retail issue in the current economic market and is currently a key trend driving the retail market.
- 3.3.13 Notwithstanding the recession, there are tentative signs that the Irish retail sector is adjusting and evolving in response to the current economic circumstances. This is evident in, for example the ability of retailers to negotiate attractive deals in the current climate. Vacancy in prime high streets and shopping centre has reduced in some areas as a result of short term lettings, although vacancy rates and dereliction in many cities and towns remains problematic. According to CBRE⁷, rents have declined by more than 50% from peak levels, although prime high street retail rents are now remaining stable.
- 3.3.14 However, notwithstanding the tentative signs of evolution in the retail sector, the performance of the retail market remains a concern. As will be detailed below, the retail sector is still characterised by high levels of vacancy, notably in relatively large town centre shopping centre developments which have failed to attract an anchor tenant.

⁶ CBRE, *Market View – Grocery Outlets in the Pipeline*, (July 2012)

⁷ CBRE, *Bi Monthly Research Report*, September 2012

- 3.3.15 In terms of retail density, CBRE⁸ also note that an analysis of the national stock of shopping centre and retail park accommodation per 1,000 population shows an unexpected variation of density throughout the country. Cork is marginally below the national average by -8%.
- 3.3.16 In this context, there is potential for the Cork Metropolitan area to continue to improve and expand its retail offer. CBRE⁹ note that just over 26% of international retailers are in Ireland, and in this regard there is further potential for more global brands to establish their presence in the Irish retail market. It notes that chains such as Decathlon, Key Fitness, DFS and the Bestseller Group are all actively seeking suitable accommodation in key locations across the country, while other existing retailers such as Awear and Promod are in expansionary mode.

Online Shopping

- 3.3.17 Perhaps the most significant emerging retail trend, and the trend which has the potential to have the most profound impact upon the nature, form and demand of future retail development, is the growth in online retail sales. The Retail Planning Guidelines (2012) state that it is clear that the proportion of sales made over the internet and mobile phones is increasing.
- 3.3.18 Whilst there is no reliable source of information in relation to the percentage of online retail sales in Ireland, in the UK it is estimated that although internet sales currently account for less than 10% of all retail sales, it is estimated internet sales accounted for nearly half of all retail sales growth in the UK between 2003 and 2010¹⁰. Retail Excellence Ireland estimates that Irish consumers will spend €3.5 billion online in 2012¹¹.
- 3.3.19 The availability of affordable smartphones has significantly increased accessibility to the online market. According to the Q1 2012 Vodafone Group quarterly results there has been an increase of 59% in the number of smartphones on the Irish network since the same time last year. The lack of availability of reliable statistics regarding on line shopping stems from the multi-channel nature of the online retailing sector which comes in many forms, including internet purchase with home delivery, internet purchase with shop collection, internet browsing followed by shop purchase, and flagship stores promoting internet purchases.
- 3.3.20 CBRE indicate that the retail sector in Ireland has almost doubled its online retail capability over the period July 2011 to July 2012, resulting in Ireland now having the fifth largest proportion of global retailers that can deliver goods bought online¹². In fact, the CBRE report indicates that the online capability of retailers in Ireland has almost doubled over that yearly period, growing from 24% in 2011 to 43% in 2012.

⁸ CBRE Market View Ireland Retail Q1 2012

⁹ CBRE Market View Ireland Retail Q1 2012

¹⁰ Department for Business, Innovation and Skills/Genecon and Partners (2011) *Understanding High Street Performance*

¹¹ Retail Excellence Ireland, *Town and City Management Framework*, (July 2012), Page 8

¹² CBRE, *Ireland Viewpoint*, (July 2012).

- 3.3.21 The same CBRE study indicates that 40% of Europe's population aged between 16 and 65 years use the internet for purchasing goods and services online. The use of the internet as a research tool in retail purchases is also illustrated by the CBRE finding that two thirds of persons research product information online before purchasing a product in the store.
- 3.3.22 A recent trend in the UK has seen outlets such as House of Fraser provide online terminals in the store and support from retail staff. Goods ordered are generally delivered the next day. Similarly, Tesco has recently opened, on a trial basis, a 'virtual' store at Gatwick airport, where you can order your goods online and have them delivered on a specific date. They have also opened their first drive through and collect store where consumers can collect goods they ordered online. "Dark stores" are also emerging in the UK. These essentially are depots where goods bought online are dispatched and thus have a quasi retail role and function.
- 3.3.23 Websites such as eBay and Amazon have considerably extended the range and profile of internet shopping. Indigenous retailers, such as Eason's, now also offer an online ordering service. Other large market players such as Debenhams and Marks and Spencer's offer on line retail services in Ireland. Women's Fashion retailers are also increasingly selling on line and brands such as Top Shop, ASOS and Monsoon all offer on line purchasing opportunities. Eason's has recently launched Ireland's first virtual bookshop at Dublin's Connolly Station.
- 3.3.24 Online convenience retailing has also increased in popularity in recent years with food retailers such as Tesco providing this facility to consumers.
- 3.3.25 The impact of online shopping on high street operators is becoming increasingly evident. Waterstones Book stores have closed a number of their stores citing online competition as the principle reason. HMV have also cited on line competition as a significant issue in terms of their future viability.
- 3.3.26 The growth of internet retailing can have an effect on the requirement for shop units / outlets and may contribute to an increase in vacancies. As detailed by CBRE the expansion of the click and collect concept could see some retailers requirements changing to smaller floor plates, higher IT connectivity, technically advanced window advertising, larger storage areas and higher usage of service yard and common areas for customers wanting to quickly collect purchased without trying them on. It may also stem investment in the development of physical retail space as some retailers such as John Lewis are choosing to invest in internet sales and technology rather than the physical roll out of new stores.
- 3.3.27 Conversely there are a significant number of online retailers delivering product to Irish consumers that as yet do not have a physical store on the market. The 2012 edition of *"How Global is the Business of Retail Study"* has shown that 43% of global retailers can deliver goods purchased online to the Irish Market. However, only 40% of these online retailers have a physical store in the Irish market. This is in comparison to an on line with physical presence of 83% in the US and 81% in the UK. According to CBRE there is potential for between 40% and 60% of the retailers selling goods online to Irish consumers to open a physical store in Ireland in coming years. CBRE's *"Europe Online Consumer Study"* in 2011 found that 90% of the European consumers studied would visit and would want to visit a physical store at least once to check out a product before purchasing online. Therefore in order for retailers to fully maximise their sales potential, a physical store will continue to be

needed. As detailed by CBRE, new retail unit concepts designed specifically to cater for 'brick and click' are emerging in the UK and have the potential to enter the Irish market, changing the design and layout requirements of potential occupiers.

- 3.3.28 The real impact of online shopping is still emerging. The increasing use of flagship stores, effectively the provision of fewer physical stores in key locations, allows the retailer to retain a visual presence in a retail centre, with sales supported by their online capabilities. Such a trend may see retailers developing their online retail store as a preferred second option after a prime physical location. This will have implications for more secondary and less dominant retail locations and increasing demand for prime pitch retail areas. Nonetheless whilst on line retailing poses a threat, it also poses an opportunity and it is likely that stores will still continue to demand a physical presence on the high street. An interesting example of how a multichannel approach works in practice is Debenhams in the UK who offer free wifi throughout its 167 shops allowing customers to access information and special deals as they walk around the store. The move brings on line and in store shopping together and illustrates how a bricks and mortar presence still works in the digital age.¹³ Argos has recently announced that they will be closing or relocating at least 75 stores in the UK and Ireland over the next 5 years as part of their move from catalogue-led business to a digitally led business¹⁴.

Town Centre Management and Business Improvement District Schemes (BIDS)

- 3.3.29 Traditionally associated with shopping centre management, the concept of town centre management is one that is evolving in the UK in particular. Co-ordinated by the Association of Town Centre Managers, town centre management involves interested parties, typically stakeholders such as retailers, promoting the vitality and viability of town and city centres through a variety of measures, such as promoting improvements to town centres (e.g. public realm improvements), imparting knowledge and training to town centre stakeholders, creating and promoting effective partnerships and liaising with government and other bodies to seek to ensure an appropriate framework is in place to support and encourage effective town centre management.
- 3.3.30 In the context of the increasingly poor performance of town centres in light of the economic recession, the concept of town centre management is likely to become increasingly important.
- 3.3.31 The concept of town centre management effectively involves establishment of one body or organisation to oversee the management of a town centre. The importance and applicability of the concept is likely to be increase in popularity as city and town centres face increasing pressure resulting from the economic downturn. Town centre management can involve both macro (i.e. seeking to influence policy, formulating marketing strategies, etc.) and micro (e.g. organising street cleaning, measures for promoting the night-time economy, etc.) factors.
- 3.3.32 One of the key tools commonly employed in town centre management are Business Improvement District Schemes (BIDS). From the first BIDS scheme in Toronto, Canada in

¹³ Experian, Retail Planner Briefing Note 10, September 2012

¹⁴ Irish Independent, Wednesday 24th October 2012

1971, the Schemes are now in operation in many cities and towns throughout Canada, the US, and the EU¹⁵.

- 3.3.33 Originating in Toronto, Canada in 1971, business improvement district schemes are now in operation in many cities and towns throughout Canada, the US and the EU. BIDS are schemes to enable the ratepayers to draw up a scheme of projects, services and works which aim to develop and implement a series of initiatives designed to both further promote and improve the trading environment for an area. The source of funding for BIDS is typically provided by way of contributions from businesses within the area through the rates system.
- 3.3.34 The use of BIDS has more recently developed in the UK where there are over 100 BIDS operational. There is evidence of its increasing popularity in an Irish context. In Ireland, BIDS are controlled by legislation, namely the Local Government (Business Improvement Districts) Act 2006.
- 3.3.35 Dublin City operates a BIDS, the objectives of which include to develop and implement a series of initiatives designed to both further promote and improve the trading environment for the area and also to improve the image of the city from a tourism perspective¹⁶. A BIDS also operates in Dundalk, Co. Louth.
- 3.3.36 Whilst the recently completed Portas Review¹⁷ is supportive of the BIDS concept, noting that BIDS are clearly a step in the right direction, it is interesting to note that the Review suggests that BIDS can be developed further and promotes the concept of ‘Super-BIDS’ which would develop a dynamic strategic vision for the towns in which they operate. The concept appears to promote a more strategic role for BIDS.
- 3.3.37 Other mechanisms used in town centre management include those such as the ‘Purple Flag Initiative’ operated by the UK Association of Town Centre Managers¹⁸. The initiative is similar to the Blue Flag for beaches and seeks to recognise town and city centres which offer safe ways for visitors to travel home, promote a good mix of venues and are appealing in the evenings. The initiative is based upon the concept that centres which have a welcoming and safe night time economy will attract and retain more visitors.

3.4 Specific Trends in Retailing

3.4.1 Set out below is an account of the relevant trends in specific areas of the retail sector in the recent past. These trends are discussed under the following headings:

- Convenience retailing
- Comparison retailing

¹⁵ Department of the Environment, Community and Local Government, <http://www.environ.ie/en/LocalGovernment/LocalGovernmentAdministration/News/MainBody,5037,en.htm>

¹⁶ See <http://www.dublincitybid.ie/> for further information

¹⁷ Mary Portas, *The Portas Review: An independent review into the future of our high streets*, (December 2011), Pages 21 & 22

¹⁸ Association of Town Centre Managers (ATCM), <http://www.atcm.org/purple-flag/>

- Retail warehousing

Convenience Retailing

Expansion of the Range of Goods Sold

- 3.4.2 There has been a trend for some of the major convenience retailers to develop and expand the range of goods now being sold in supermarkets, which has included an increase in the number of individual food and non-food convenience lines and the stocking of comparison goods such as clothing, books and cd's. This has resulted in the merging of comparison and convenience retailing within one store.
- 3.4.3 In the UK it has been estimated that supermarkets now allocate more than one third of their floor space to non-food sales¹⁹.
- 3.4.4 This has implications for planning authorities who have traditionally distinguished between these formats in the formulation of retail policy. It also requires a more complex assessment of retail impact than would previously have been required.

Competition from Discounters

- 3.4.5 The emergence of discount retailers, such as Aldi and Lidl, has been a notable trend over the past decade. The Retail Planning Guidelines (2012) indicate that Lidl has a market share of 5.5% and Aldi has a market share of 3.6%. Recent evidence would suggest that Aldi is expanding rapidly and increased its market share by 30% from 2011 to 6%, whilst Lidl holds 6.6%.²⁰
- 3.4.6 Discount retailers have significantly increased their number of stores in recent years and it is envisaged that their expansion programme will continue. In this regard, Aldi has developed a second national distribution centre in Mitchelstown; which it is anticipated will serve their expanding network of stores in the country. Lidl has a distribution centre in Charleville.

Concentration of Market Share

- 3.4.7 Analysis of the market share for convenience retailing in Ireland illustrates that the market is dominated by a limited number of retailers, such as Tesco, Dunnes Stores and Super Valu, notwithstanding the relatively recent emergence of discount foodstores such as Aldi, Lidl, and Buy Lo. As noted in a recent report by Roger Tym and Partners²¹, despite the economic downturn the grocery market has been very resilient; it has seen growth where other aspects of the retail sector have seen contraction. Many foodstore operators have taken advantage of the gap created by the market, by the collapse of speculative development following the credit crunch and they have used this opportunity to increase expansion

¹⁹ Department for Business, Innovation and Skills/Genecon and Partners (2011) *Understanding High Street Performance*

²⁰ Irish Times, 16th October 2012

²¹ Roger Tym and Partners, Foodstore Scheme at Station Road, Whittlesey – Commercial Assessment of Delivery prospects, Final Report, July 2012.

activity. With consumer budgets tightening in recent years, foodstore operator's strategies to increase market share have focussed on heavily discounting goods and opening new stores.

- 3.4.8 The Retail Planning Guidelines (2012) state that Tesco has the largest share of the Irish retail market, followed by Dunnes Stores and Supervalu and that these three retailers account for 70.8% of the Irish retail market. Tesco is the dominant player with 29% of the market. A combination of other retail players including Centra, Spar and Marks and Spencer account for 12.1% of the overall market²².
- 3.4.9 This trend is likely to continue in the future as the major players seek to increase their market share. These retailers have the advantage of greater economies of scale than their smaller scale competitors.
- 3.4.10 It is also noticeable that many of these major retailers have introduced new formats to compete in the local convenience markets which provide top-up shopping as opposed to a weekly shopping (e.g. Tesco Local & Tesco Express, Superquinn Select, Marks and Spencer Simply Food).
- 3.4.11 There has also been a noticeable development of convenience outlets attached to petrol service stations. This is relatively prevalent throughout Cork Metropolitan area, with convenience outlets at service stations often providing a service to local residents.

Farmer Markets and Ethnic Shops

- 3.4.12 Farmer markets normally operate on a weekly basis and provide the opportunity for independent traders to sell a variety of fresh products such as fruit and vegetables, cheese, speciality breads, and sundry items such as olives, jams, chocolates, wine etc.
- 3.4.13 There are a number of farmers markets throughout the Metropolitan area including Midleton Farmers Market on Hospital Road, Mahon Farmers Market on Thursday mornings and Cornmarket Street Market in Cork City. The famous English Market in the City is also a significant attraction. Farmers markets also operate in other towns, such as Ballincollig, Douglas, and Blarney.
- 3.4.14 Another emerging trend is the increase in ethnic markets and stores specialising in ethnic products such as food, fashion and hair products. A number of such stores can be found in Cork City and in the metropolitan towns of Cork.
- 3.4.15 In the UK, guidance has been published in relation to 'Retail Markets'. This guidance recognises that markets are important in bringing vibrancy and character to the town centre, and often attracting tourists²³.

Comparison Retailing

²² Irish Times, 16th October 2012

²³ Department for Communities and Local Government, *Retail Markets: A Good Practice Guide*, September 2010, Page 4

Larger Sized Units

- 3.4.16 The trend for increased sized units evident is evident in the comparison shopping sector. This is most clearly seen in a comparison of the newest retail developments and those that are as little as 10 years old. It is also a feature of the newest brand multiples which have recently entered the Irish market. The trend for larger floorspace for comparison stores is for example illustrated in Opera Lane in Cork. It is estimated that the average size of a retail unit in the Dundrum Shopping Centre is circa 150 sq. metres, whereas the average unit size in the Tallaght Shopping Centre, built during the 1980's, is half of that, at circa 75 sq. metres.²⁴
- 3.4.17 This trend could potentially negatively impact on the ability of town and city centres to provide the required floorspace as the traditional built form of many town and city centres would not readily supply such units in a single property, thereby requiring often complex and time consuming site assembly. New build shopping centres can represent a simpler and more cost effective way for new multiples requiring large units to enter the market. Such developments, however, can have a significant adverse impact on the town/city centre, particularly if developed for higher order comparison shopping.

International Multiples

- 3.4.18 There is now a far greater presence of European and International multiples in the Irish retail market. Even within the last decade, the retail sector has seen the introduction of new brands into the country, e.g. H & M, New Look, Zara, Gap, Diesel, Abercrombie and Fitch and American Apparel.
- 3.4.19 International retailers require larger size units. However, a side effect of the introduction of such international and indeed national multiples is a degree of homogenisation of town and city centres, with a potential risk of eroding their distinctive character.
- 3.4.20 In the UK, a study by the NEF classed 41% of town centres as clones in 2005, where more than half the stores were chains, with a further 23% of town centres on the verge of being classified as clones²⁵.
- 3.4.21 Independent retailers are an important part of the retail profile and create a sense of diversity and uniqueness to the retail environment. The homogenisation of town centres can lead to a loss of character and attractiveness in retail terms and can make such town centres more vulnerable in periods of economic recession.

Emergence of Pop-Up Stores

²⁴ James Nugent, Lisney, *The Distressed market – The Emerging Role of Planners in the Wider Urban Regeneration Market*, Unlocking Town Centre Potential New Developments in Retail Planning and Town Centre Management Conference, October 2012.

²⁵ New Economics Foundation (NEF), *Clone Town Britain* (June 2005), available at: <http://www.neweconomics.org/publications/clone-town-britain>

3.4.22 Pop-Up stores make use of vacant retail uses on a short term basis and are typically used by a retail to test market a new product or brand. Pop-up stores can make a positive contribution to the appearance of a retail centre by removing the appearance of an otherwise vacant unit. Vacant units may also be put to cultural, social or artistic uses. Whilst such stores are an innovative way of dealing with vacancy, they are still relatively rare.

Polarisation of Retail Development

3.4.23 There is increasing concentration international and national retail multiples in the strong city and town centres. Medium and smaller scale centres are losing out. Furthermore, there is an emerging trend in the UK for some retailers to seek to operate fewer stores, concentrating their remaining stores in the large, more popular centres.

3.4.24 An example of this is the reduction in the number of stores operated in the UK by Arcadia, which runs outlets such as Top Shop, Burton, Dorothy Perkins and BHS. Arcadia expect to close up to 260 stores over the next few years²⁶. The Portas Review estimates that the number of town centre stores in the UK fell by almost 15,000 between the years 2000 and 2009, with an estimated further 10,000 losses over the past couple of years²⁷.

3.4.25 Another influence may be the emerging trend for some retailers, particularly large national and international retailers, to opt for one or a small number of flagship stores in prominent locations. The increased popularity of online shopping may also impact on the number of stores required by a retailer. Increasing numbers of retailers are using bricks and mortar stores a showroom for products, a service location and collection/drop off points for online orders. Two examples of this are Simply Be (an on line catalogue owns by home shopping retailers N Brown) which opened its first store in the UK in September 2011 and has since added 6 new stores and Pixmania, an online camera retailer which runs small stores in shopping malls²⁸.

3.4.26 The result of this polarisation is a widening gap is being created between the larger centres and the remaining centres, especially for comparison shopping. This leads to an increasing leakage of trade from smaller centres to larger ones, with smaller town centres being particularly vulnerable.

Retail Warehousing

3.4.27 The pattern of retail warehousing is now well established in Ireland, with a growing trend for a concentration of warehouse units in retail parks. This form of retailing tends to be more reliant on private transport given the predominantly bulky nature of goods sold. It is frequently not suited to town centre sites owing to the need for a large site area to contain both the unit and the associated car parking. In recent years Ireland has witnessed an over provision of this type of retailing and in some instances this has resulted in high rate of vacancy in this type of retail development.

²⁶ BBC News, 24th November 2011, <http://www.bbc.co.uk/news/mobile/business-15867924>

²⁷ Mary Portas, *The Portas Review: An independent review into the future of our high streets*, (December 2011), Page 8

²⁸ Experian, Retail Planner Note 10, September 2012.

- 3.4.28 The Retail Planning Guidelines state that retail warehouse parks should not adversely impact on the vitality and viability of town centres provided that the range of goods sold in the units is restricted to bulky items, as defined in the Guidelines.
- 3.4.29 It is noted that there is a recent trend towards broadening the range of goods sold in these parks. This could represent a potential threat to town centres as retail parks may be viewed as a more attractive location for new development, providing larger units and substantial car parking more easily than some town centre sites.
- 3.4.30 The Retail Planning Guidelines (2012) seek to respond to this issue by including an amended definition of 'bulky goods' which now includes *"household appliances"* *"catalogue shops"* and *"tools and equipment for the house and garden"*. The Guidelines emphasize that bulky goods are truly bulky goods or goods generally sold in bulk which are not portable by customers travelling by foot, cycle or bus, or require large floorspace to display them.
- 3.4.31 The Retail Planning Guidelines also state that, in general, there should be a presumption against further development of out-of-town retail parks except where a development plan or any relevant retail strategies identify a need for the provision of additional bulky format retailing.
- 3.4.32 A notable trend evident in the UK is that the regulatory environment has not been sufficiently strong to avoid the negative effects on town and city centres of development of this type, particularly as a number of early retail parks have been transformed into 'fashion parks' or 'factory outlet centres', with the goods on sale often indistinguishable from those sold at a conventional 'High Street' location.

3.5 Conclusions and Opportunities

- 3.5.1 The changing economic context has required, and will continue to require, innovation in the development of the retail sector. The potential for large scale mixed use and town centre schemes has been reduced, due to lack of available funding and in general the retail sector has contracted. However, some retailing sectors have remained relatively strong, notably the discount foodstore sector. Some comparison high street retailers also continue to expand and invest in Ireland.
- 3.5.2 The convenience sector by its nature continues to attract a demand and continues to be developed as a result albeit at a slower rate. Increased competition from discount retailers, the continued domination of the market by a small number of large retail providers, and the requirement for larger floorplates are some of the key trends in the convenience sector.
- 3.5.3 The comparison sector has suffered a decline, as has the demand for retail warehousing, and both these sectors in particular will require innovation and investment to ensure that key centres retain their attraction. The decline has been less in the clothing and footwear sector than in household goods. The enhancement of the comparison sector in designated centres and prime retail areas will be a key factor in seeking to retain expenditure and ensure sustainable patterns of development.

- 3.5.4 The requirement for larger floorplates, which often presents a difficulty in smaller or historic, driven in part by the demands of international retailers entering the market, is a key trend in the comparison sector. An evolving online market is also likely to have a significant affect on the retail sector in the medium term with retailers increasingly developing stores as showrooms for customers who then complete their purchase on line. As noted in this review, there are opportunities to attract retailers who currently offer on line services to Ireland but do not have a physical presence here. According to research by Deloitte, about one fifth of all internet transaction involve some research in store before an internet purchase is made. In this regard a bricks and mortar presence is still required.
- 3.5.5 Opportunities arising from the recession include the opportunity to consolidate and re-invent town centres. Town centre management, a concept that has been prevalent in the UK for many years but which has not been developed to any significant extent in Ireland, is likely to play an increasing role in ensuring the attractiveness, vitality and viability of town centres.
- 3.5.6 Heritage and tourism towns, such as Blarney, Cobh and Midleton, remain well placed to attract visitors. Improving and / or maintaining the public realm and environmental amenity of town centres to increase their attractiveness is also likely to be a factor in retaining expenditure and attracting visitors.
- 3.5.7 It should be recognised that one of the residual effects of the recession has been a number of extant permissions for ambitious town centre redevelopment, often including significant retail provision, which are now unlikely to be implemented.
- 3.5.8 A pragmatic approach should be taken to such extant permissions, recognising that any implementation of such permissions is likely to be on a much reduced scale from that originally approved, and / or on a phased basis. The appropriate redevelopment and revitalisation of town centres lands should continue to be promoted.

CHAPTER 4: SURVEY APPROACH AND ANALYSIS

4.1 Introduction

4.1.1 In order to establish the baseline data for the retail study, it was necessary to undertake a number of qualitative and quantitative surveys. These included:

- Survey of existing retail floorspace within the Metropolitan Area;
- Survey of vacant units throughout the Metropolitan Area;
- Household Telephone Survey undertaken by Demographics Ireland;
- On Street - Shoppers Survey undertaken by Demographics Ireland;
- Consultation with key stakeholders;

4.1.2 A brief description of each of the surveys carried out, identification of the methodology utilised in undertaking the surveys and the key survey results are set out below.

4.2 Floorspace Survey

4.2.1 A detailed floorspace study has been undertaken of existing retail floorspace within the Metropolitan Area to inform the quantitative analysis.

4.2.2 All retail premises in the Metropolitan Area were visited and the floorspace survey results include information on the following:

- The location of the retail premises (street name/GPS Reference);
- Address of the retail premises;
- Name of retail premises;
- Type of retail business e.g. newsagent, butcher, clothing etc.
- Categorisation as to whether convenience, comparison or bulky goods in accordance with the guidance set out within the Retail Planning Guidelines;
- The net retail floor area
- All data obtained from the survey is linked to a Geo directory system.

Classification

4.2.3 Annex 1 of the 2012 Retail Planning Guidelines provides clear guidance on the classification of convenience, comparison and bulky goods floorspace. The floorspace survey categorised the different retail units within the Metropolitan Area in accordance with the following definitions as set out within the 2012 Retail Planning Guidelines:

Convenience

- Food
- Alcoholic and non-alcoholic beverages
- Tobacco

- Non-durable household goods²⁹

All supermarkets, smaller convenience stores and retail food outlets (excluding fast food takeaways, restaurants and cafes) were included in this category.

Comparison

- Clothing and footwear
- Furniture, furnishings and household equipment (excluding non-durable household goods)
- Medical and pharmaceutical products, therapeutic appliances and equipment
- Educational and recreation equipment and accessories
- Books, newspapers and magazines
- Goods for personal care
- Goods not elsewhere classified
- Bulky goods

Bulky Goods

4.2.4 While the bulky goods category is listed under the classification of comparison floorspace above, it is considered appropriate to make a distinction within the Retail Study between pure comparison floorspace and bulky goods. The Annex 1 definition includes a list of goods which are considered to fall within the bulky goods category as follows:

- Goods generally sold from retail warehouses where DIY goods or goods such as flat pack furniture are of such a size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that a large area would be required to display them e.g.
- repair and maintenance materials
- furniture and furnishings
- carpets and other floor coverings
- household appliances
- tools and equipment for the house and garden
- bulky nursery furniture and equipment including perambulators
- bulky pet products such as kennels and aquariums
- audio visual, photographic and information processing equipment
- catalogue shops and other bulky durables for recreation and leisure

4.2.5 The Guidelines state that *'the list is not exhaustive – bulky goods not mentioned in the list should be dealt with on their merits in the context of the definition of bulky goods'*.

Net Retail Area

4.2.6 It should be noted that for the purpose of this study, the floor areas relate to the net retail floor area. Net retail floorspace is defined in the Retail Planning Guidelines (2012) as:

“The area within the shop or store which is visible to the public and to which the public has access including fitting rooms, checkouts, the area in front of the checkouts, serving counters and the area behind used by serving staff, areas occupied by retail concessionaires, customer service areas, and internal lobbies in which goods are displayed, but excluding storage areas, circulation space to which the public does not have access to, cafes, and customer toilets”.

4.2.7 Therefore any ancillary floorspace such as offices, store rooms etc. are excluded from the net retail floorspace figure.

4.2.8 A summary of the existing quantum, format and location of retail floorspace currently existing within the Metropolitan Area is summarised in Table 4.2.1 below.

Location	Convenience	Comparison	Bulky Household
Cork City	16,201	88,407	6,860
Mahon District Centre & Retail Park	2,969	16,808	13,384
Blackpool DC & Retail Park	4,011	11,198	3,408
Wilton DC	4,022	7,272	0
Ballyvolane DC	4,001	2,011	924
Douglas DC	12,435	12,255	2,431
Cork City Suburban Neighbourhood Centres	12,732	4,916	0
Cork City & Suburbs Retail Warehouse Floorspace	0	79	44,216
Cork City Local Centres	4,471	1,333	1,013
Residual Floorspace within Cork City Council Area	5,686	3,154	1,495
Passage West and Monkstown	1,399	145	0
Blarney	954	3,452	764
Glanmire	2,707	813	175
Carrigtwohill	1,962	1,678	5,029
Carrigaline	6,881	5,352	6,154
Midleton	8,529	9,423	7,407
Cobh	5,408	3,248	1,533
Ballincollig	9,728	11,445	2,784
Little Island	1,167	162	8,917
Other Rural	3,729	824	3,783
Total	108,992	183,975	110,277

Table 4.2.1: Floorspace Survey

4.2.9 Whilst different approaches were taken to the calculation of retail floorspace in the 2007 survey used to inform the 2008 Cork Strategic Retail Study and the 2012 survey, a comparison of the results nonetheless reveals some interesting results. Overall floorspace has increased in the Metropolitan area over the past 5 years. The 2008 Retail Study identified a total of 60,722 sq.m. convenience and 137,832 sq.m. comparison floorspace within the Metropolitan Area. The 2012 survey results identify an increase in convenience floorspace of 48,270 to 108,992 in 2012 and an increase of 46,143 sq.m. in comparison floorspace to 183,975 in 2012 within the Metropolitan Area.

4.2.10 A comparison with the floorspace figures set out within the 2008 Retail Study identifies how the floorspace in the City has increased significantly since 2007. Over 14,000 sq. metres of additional comparison floorspace has been developed over this period. This is has been achieved in new schemes such as Opera Lane and Cornmarket. Other centres such as Mahon have also increased from 14,100 sq. metres of comparison floorspace to 16,808 sq. metres. Blackpool DC has also significantly increased its comparison offer, most likely due to the opening of a number of comparison operators within the retail park. Within the metropolitan towns, Ballincollig has almost doubled its comparison floorspace, due to the development of the Ballincollig Town Centre and Old Quarter developments. Other centres show relatively modest growth such as Midleton which has only experienced a small growth in comparison floorspace.

4.3 Vacancy Survey

4.3.1 A survey of all vacant floorspace within the Metropolitan area was undertaken to inform the retail study. In accordance with the approach adopted within the floorspace survey, vacancy levels are expressed as net retail areas. Vacancy levels are presented in Tables 4.2.2 and 4.2.3 below.

4.3.2 Table 4.2.2 sets out the total vacant floorspace within the Metropolitan area – split between the various towns and rural areas. These figures are expressed both in terms of a percentage of the overall floorspace and a percentage of the total number of units.

CENTRE	VACANCY AS A PERCENTAGE OF TOTAL NET FLOORSPACE				VACANCY AS A PERCENTAGE OF NUMBER OF UNITS		
	Total Non-Vacant Retail Floorspace (Sq.m Net)	Total Vacant Floorspace (sq.m. net)	Total Floorspace (Occupied & Vacant)	% Vacant (of Total Floorspace)	Total No. of Units	No. of Vacant Units	% Vacancy

City Centre							
City Centre	111,518	33,754	145,272	23.2	758	239	31.5
District Centres							
Ballyvolane	6,936	390	7,326	5.3	13	2	15.4
Blackpool	18,419	2,971	21,390	13.9	47	8	17.0
Wilton	11,294	1,005	12,299	8.2	55	9	16.4
Mahon	33,161	1,632	34,793	4.7	54	5	9.3
Douglas	27,121	6,010	33,131	18.1	143	37	25.9
Metropolitan Towns							
Ballincollig	24,011	11,765	35,776	32.9	150	58	38.7
Blarney	5,170	760	5,930	12.8	28	9	32.1
Carrigaline	18,387	1,988	20,375	9.8	74	17	23.0
Carrigtwohill	8,669	1,928	10,597	18.2	37	12	32.4
Cobh	10,189	4,031	14,220	28.3	90	32	35.6
Glanmire	3,695	1,325	5,020	26.4	29	10	34.5
Midleton	25,359	9,399	34,758	27.0	174	43	24.7
Passage West	1,434	810	2,244	36.1	14	8	57.1
Other Areas							
Little Island	10,246	12,096	22,342	54.1	21	9	42.9
Total	315,609	89,864	405,473	22.2	1,687	498	29.5

Table 4.2.2: Vacancy Levels throughout the Metropolitan Area

4.3.3 Table 4.2.3 sets out details of the total vacant floorspace within the core retail areas of the City Centre and the Metropolitan Towns expressed in terms of the overall percentage of overall floorspace and as a percentage of the total number of retail units within the core retail area. Vacant retail units in the core retail area have been mapped and are attached in Appendix 3 of the retail study.

Centre	Total No. of Units	No. of Vacant Units	% Vacancy	Total Floorspace sq.m.	Total Vacant Floorspace sq.m.	% Vacancy
Cork City Centre	556	133	24%	118,117	20,805	18%
Ballincollig	111	52	47%	31,619	6,113	19%

Blarney	7	2	29%	3,481	162	5%
Carrigaline	41	10	24%	10,023	986	10%
Carrigtwohill	17	6	35%	2,023	884	44%
Cobh	33	9	27%	2,593	608	23%
Douglas	97	28	29%	24,054	4,820	20%
Glanmire	18	6	33%	3,476	663	19%
Midleton	103	23	22%	9,632	2,706	28%
Passage West	8	4	50%	636	434	68%
Total	981	273	28%	205,655	38,183	19%

Table 4.2.3: Core Retail Area Vacancy Levels

- 4.3.4 The vacancy figures set out within Tables 4.2.2 and 4.2.3 above illustrate how vacancy levels vary significantly throughout the Metropolitan Area. The figures also vary depending on whether they are calculated based on number of units or floorspace. In reviewing the figures it is considered that the vacancy expressed as a percentage of floorspace within the retail core (as illustrated in Table 4.2.3 above) is the most relevant figure.
- 4.3.5 Vacancy levels in this category range from 5% within Blarney to 68% within Passage West. It is noteworthy that smaller Metropolitan towns including Passage West and Carrigtwohill have higher vacancy levels but this is as a result of the low level of existing floorspace currently provided within these towns. Vacancy levels within the Larger Metropolitan towns of Midleton and Ballincollig are mainly attributed to new floorspace in schemes which have never been occupied.
- 4.3.6 Existing vacancies are considered within the quantitative assessment of this retail study and furthermore within the health check assessment of individual centres. In assessing these figures it is important to have regard to the fact that not all vacant floorspace is retail in nature. The vacancy figures obtained for the purposes of the retail study identify all vacant units within a town centre and such units could potentially be accommodated by a range of retail and non-retail uses including financial, service and other town centre uses.

4.4 Household Survey

- 4.4.1 The household survey is key in determining the existing shopping patterns in the Metropolitan Area for different retailing types including clothing, footwear, food and bulky household goods. The results of this survey are important to obtain an understanding of the levels of outflows and retention of expenditure within the study area.

Methodology

- 4.4.2 A comprehensive survey of households within the identified catchment area was undertaken by Demographics Ireland, an independent survey company, in September 2012. The objective of this study was to establish the existing shopping patterns within the Metropolitan Area.

4.4.3 A catchment area for the Metropolitan Area was identified by Demographics Ireland based on drive time isochrones from the area. The survey area used was designed to be consistent with the drive time isochrones prepared by Demographics Ireland for the purpose of undertaking the quantitative assessment of the scope of future retail development in the Metropolitan Area. The catchment area is split into the following main areas:

- Area 1 Cork City Council Area
- Area 2 The Metropolitan Area excluding the Cork City Council Area
- Area 3 The Metropolitan Area commuting area
- Area 4 Cork County North
- Area 5 West Cork
- Area 6 Catchment area outside Cork - Kerry, Limerick, Tipperary and Waterford

4.4.4 Areas 3, 4 and 5 are grouped in a “Cork County excluding Metropolitan Area” category for the presentation of the survey results. The catchment area is identified in Figure 4.3.1 below:

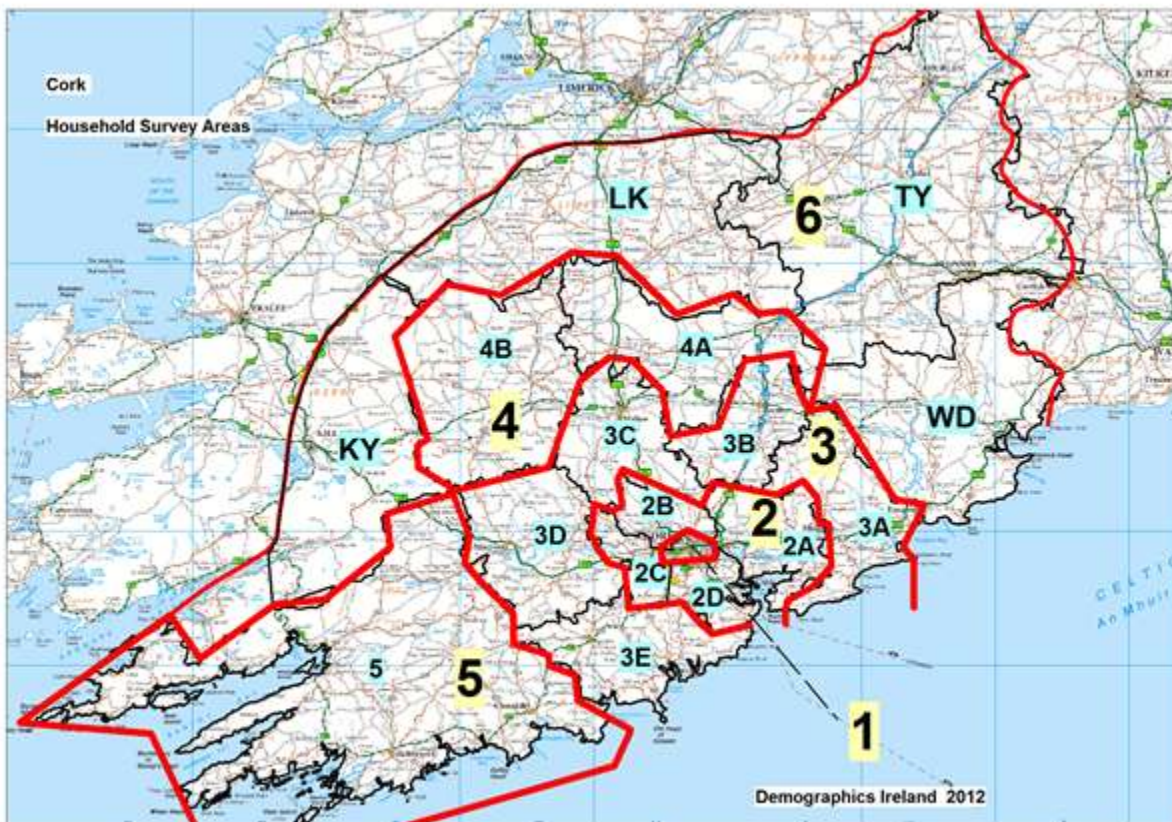


Figure 4.4.1: Identified Catchment Areas; Source: Demographics Ireland

4.4.5 A total of 1,014 household surveys were undertaken for the purposes of this study. The number of questionnaires undertaken within each of the survey areas was determined based on pro rata population split. The survey scheme was selected to give equal

representation to households in each of the catchment areas i.e. Cork City, Rest of Cork Metropolitan Area, Rest of Cork County and Parts of neighbouring Counties within a 90 minute drive-time. However the calculated sample sizes gave a sub-optimal count for the Cork City sample. In order to redress this, the City Centre sample was increased to 250 and the number of questionnaires allocated to the neighbouring counties outside of County Cork but within the catchment area (classified as Area 6) were reduced. This approach improved the accuracy of the survey without prejudicing results and conclusions.

- 4.4.6 Each drive-time segment was subdivided geographically to ensure the sample was proportionally represented within each band. Telephone calls were made meeting specified quotas within each subdivision using a randomisation sequence of land-line telephone numbers.

Survey Questions

- 4.4.7 The household survey primarily contained questions relating to where the respondents carry out their main food shopping, top up shopping, bulky household goods shopping and clothing and footwear shopping. The survey also included other useful information such as the mode of transport used for shopping trips and the frequency of shopping trips to centres outside of the Metropolitan Area. An overview of the main survey results is provided below.

Main Food Shopping

- 4.4.8 Respondents were asked *“Regarding your household food and grocery shopping, where do you normally go to carry out your main food and grocery shopping, or do you shop on the internet for your main food and grocery shopping?”*
- 4.4.9 Table 4.4.1 lists the principal shopping locations used for convenience shopping within the catchment area. The response to this question illustrates, as would be expected, that there is a significant degree of retention of convenience expenditure within the Metropolitan Area with 99.6% of all respondents who live within the Metropolitan Area carrying out their main food and grocery shopping in centres within the Metropolitan Area. The survey results also illustrate an inflow of 17.5% of expenditure in the remainder of the County outside of the Metropolitan area.
- 4.4.10 Similar to the results observed from the household survey undertaken to inform the 2008 Cork Strategic Retail Study, Douglas is listed as the most popular location for food and grocery shopping within the Metropolitan area with 8.5% of all respondents carrying out their main food and grocery shopping at this location. 13.7% of respondents who live within the Cork City Council Area and 16% of respondents who live within the metropolitan boundary outside of the City Centre carry out their main food and grocery shopping at this location. Douglas also acts as an attraction to residents within the outer metropolitan zone. An inflow of 2.4% is observed from the remainder of Cork outside of the metropolitan area.
- 4.4.11 The role of Midleton as a Large Metropolitan Town serving a large rural hinterland is also reflected within the survey results. Midleton acts as the second most popular location for food and grocery shopping within the Metropolitan Area. 8.9% of all respondents living

- within the Metropolitan Area carry out their main food and grocery shopping within Midleton. The catchment area of the town also encroaches outside of the Metropolitan Area and an inflow of 6.9% is observed from the remainder of the County. This inflow primarily originates from the area identified as Zone 3A, the zone which lies directly east of the town as identified within Figure 4.4.1 above.
- 4.4.12 Similarly, Ballincollig acts as a significant location for main food and grocery shopping in accordance with its designation as a Large Metropolitan Town in the outer Metropolitan Area. 6.1% of all respondents within the catchment area carry out their main food and grocery shopping at this location.
- 4.4.13 The prominence of the suburban district centres of Ballyvolane, Blackpool and Wilton in terms of main food and grocery shopping are also observed from the survey results. A market share of 5.5% is observed in Ballyvolane, 4.6% in Blackpool and 4.3% in Wilton. Cork City maintains a market share of 4.5%.
- 4.4.14 The performance of Ballyvolane, Blackpool and Wilton as prominent locations for food and grocery shopping contrasts with the results for Mahon Point, where a market share of just 1.5% is observed.
- 4.4.15 Cork City Centre attains a market share of 4.5% within the overall survey area and 14.9% within the Cork City Council Area. Limited inflows of convenience expenditure are observed into the City Centre from outside of the Metropolitan Area. This demonstrates the localised nature of convenience shopping. Existing neighbourhood centres and local centres attain a market share of 16.5%.

	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Total Metropolitan Area	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Base	914	241	243	484	246	184
Within Metropolitan Area						
Douglas	8.5%	13.7%	16.0%	14.9%	2.4%	
Midleton	6.6%		17.7%	8.9%	6.9%	
Ballincollig	6.1%	0.4%	18.9%	9.7%	3.7%	
Ballyvolane	5.5%	15.4%	3.7%	9.5%	1.6%	
Neighbourhood and Local Centres within Cork City Administrative Boundary	4.8%	16.6%	1.6%	9.1%		
Blackpool	4.6%	13.3%	3.7%	8.5%	0.4%	
Cork City Centre	4.5%	14.9%	1.2%	8.1%	0.4%	0.5%
Wilton	4.3%	10.8%	4.5%	7.6%	0.8%	
Bishopstown	3.2%	7.9%	3.7%	5.8%		0.5%
Carrigaline	3.1%		11.1%	5.6%	0.4%	
Cobh	1.9%	0.4%	6.6%	3.5%		
Glanmire	1.9%	1.2%	5.3%	3.3%	0.4%	
Mahon Point SC	1.5%	4.1%	1.2%	2.7%	0.4%	
Carrigtwohill	0.4%		1.6%	0.8%		
Blarney	0.3%		1.2%	0.6%		
Passage West	0.2%		0.8%	0.4%		
Crosshaven	0.1%		0.4%	0.2%		
Total within Metropolitan Area	57.4%	98.8%	99.6%	99.2%	17.5%	1.1%
Outside Metropolitan Area						
Rest of County Cork	24.3%	1.2%	0.4%	0.8%	75.2%	17.9%
Limerick	6.2%				0.8%	29.9%
Kerry	5.0%				6.1%	16.8%
Tipperary	4.8%				0.4%	23.4%
Waterford	2.2%					10.9%
Total Outside Metropolitan Area	42.6%	1.2%	0.4%	0.8%	82.5%	98.9%

Table 4.4.1: "Where do you normally carry out your main food and grocery shopping?"

*Non responses and shop around responses excluded

4.4.16 Respondents were asked to state their main reason for shopping at the store/location where they carry out their main food and grocery shopping. The results are illustrated in Table 4.4.2 below. It is clear that the key determinant in this instance is geographical proximity with 52.2% of respondents stating “close to home” as being their main reason in determining the location of where they carry out their convenience shopping. 25.1% of respondents referred to “good value for money” and 9.7% cited “wide choice of goods”.

Main Reason - Food and Grocery Shopping	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Total Metropolitan Area	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Base	953	244	245	489	285	179
Close to Home	52.2%	53.3%	53.5%	53.4%	47.7%	55.9%
Good value for money	25.1%	25.8%	26.5%	26.2%	23.5%	24.6%
Wide choice of goods	9.7%	7.0%	8.6%	7.8%	13.3%	8.9%
Good quality products	7.7%	7.4%	9.0%	8.2%	8.4%	5.0%
Ease of Parking	3.9%	4.1%	2.0%	3.1%	4.9%	4.5%
Parking cheap/free	0.8%	1.2%		0.6%	1.4%	0.6%
Close to other shops	0.5%	1.2%		0.6%	0.4%	0.6%
Close to Work	0.2%		0.4%	0.2%	0.4%	

Table 4.4.2: Main reason for shopping at food and grocery location

4.4.17 The response to this question varied depending on the main grocery stores used. Respondents who carried out their main food shopping in large multiple stores such as Tesco, Dunnes and SuperValu stated that “proximity to home” was their main reason for visiting these stores, while the main reason stated for shopping in discount foodstores such as Aldi and Lidl relates to “good value for money”.

4.4.18 Respondents were also asked how frequently they carry out their main food and grocery shopping. 67.6% of respondents stated that they carried out their main food and grocery shopping "once a week", 19.3% stated "twice or three times a week", 7.2% of respondents stated that they carried out their main food and grocery shopping "once a fortnight" and 4.2% of respondents carry out their food shopping on a daily basis.

4.4.19 In terms of the mode of transport used, the majority of respondents surveyed (91.3%) travel by car, whether they are the driver or just passenger, to do their main food shopping. 5.8% walk, 1.5% take the bus, 0.9% travel via taxi, 0.4% have their shopping delivered and 0.1% carry out their main shopping on bicycle.

Mode of Transport	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Total Metropolitan Area	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Base	1014	250	254	504	306	204
Drive self in car	84.5%	71.2%	89.0%	80.2%	89.2%	88.2%
Passenger in car	6.8%	13.2%	4.3%	8.7%	4.6%	5.4%
Walk	5.8%	10.0%	4.3%	7.1%	4.6%	4.4%
Bus	1.5%	2.8%	2.0%	2.4%	0.3%	1.0%
Taxi	0.9%	2.8%	0.4%	1.6%		0.5%
Delivered	0.4%				1.3%	
Bicycle	0.1%					0.5%

Table 4.4.3: Mode of transport used for carrying out main food/grocery shopping

Convenience Satisfaction Rating

4.4.20 Respondents were asked if they were satisfied with where they carry out their main food and grocery shopping. The responses to this question displayed a high level of satisfaction, with 95% of respondents stating that they were either "very satisfied" or "satisfied" with where they carry out their main food and grocery shopping.

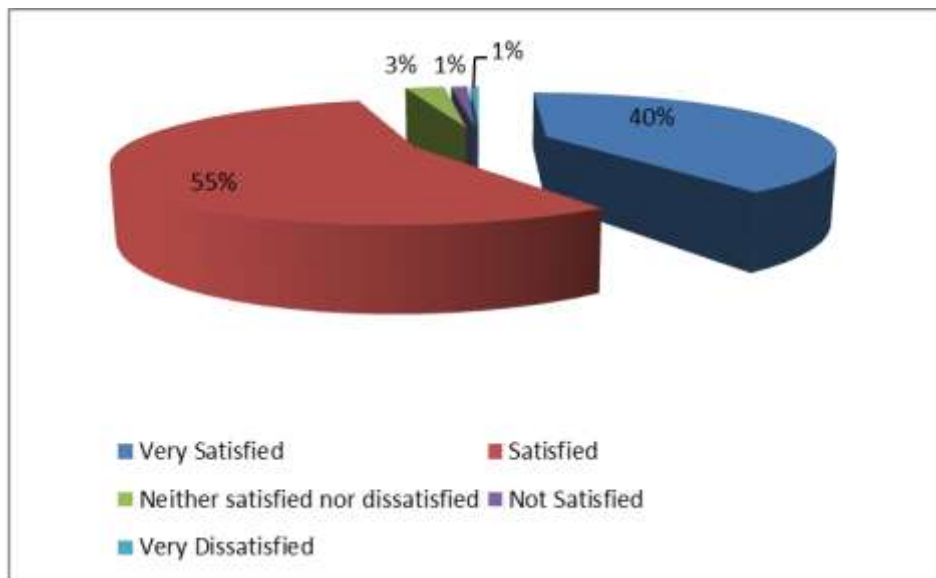


Figure 4.4.2: Convenience satisfaction rating

4.4.21 Of the respondents who stated that they were either dissatisfied or very dissatisfied with where they carry out their main convenience shopping 55% stated that these goods were "too expensive", 30% referred to "poor range of goods", 10% referred to "poor shopping environment" and 5% referred to "distance".

Top Up Shopping

4.4.22 Respondents were asked where they carry out their main “top-up” shopping. The results illustrated in Table 4.4.4 below show how the majority of respondents (98.7%) who live within the metropolitan area undertake their main top up shopping in centres within the area. This high level of retention of expenditure is reflective of the nature of this form of shopping.

Top -Up Shopping Location	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Total Metropolitan Area	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Base	948	249	226	475	269	204
Within Metropolitan Area						
Centre Cork City	10.0%	22.9%	10.2%	16.8%	5.6%	
Ballincollig	6.3%		24.8%	11.8%	1.5%	
Douglas	6.1%	10.4%	12.8%	11.6%	1.1%	
Midleton	5.8%		18.1%	8.6%	5.2%	
Ballyvolane	5.4%	13.7%	5.8%	9.9%	1.5%	
Togher	3.7%	8.4%	6.2%	7.4%		
Wilton SC	3.0%	9.2%	1.8%	5.7%	0.4%	
Bishopstown	2.6%	9.2%	0.9%	5.3%		
Carrigaline	2.6%	0.4%	10.6%	5.3%		
Blackpool SC	2.2%	6.8%	1.8%	4.4%		
Blackrock	1.7%	6.4%		3.4%		
Mahon Point SC	1.3%	4.0%	0.4%	2.3%	0.4%	
Churchfield	1.3%	4.8%		2.5%		
Carrigtwohill	1.2%		4.9%	2.3%		
Ballyphehane	0.7%	2.8%		1.5%		
Total within Metropolitan Area	53.9%	99.2%	98.2%	98.7%	15.6%	
Outside Metropolitan Area						
North County Cork	12.8%	0.8%	1.8%	1.3%	41.3%	2.0%
West County Cork	12.1%				42.8%	
East Cork	0.6%					2.9%
Co. Waterford	3.1%					14.2%
Co. Tipperary	3.3%					15.2%
Co. Limerick	4.4%				0.4%	20.1%
Co. Kerry	9.8%					45.6%
All Outside Metropolitan Area	46.1%	0.8%	1.8%	1.3%	84.4%	100.0%

Table 4.4.4: Top up shopping location

4.4.23 The most popular form of transport used for top-up shopping was by car, with 70.3% of respondents noting that they drive or are passengers in a car when carrying out their top up

shopping. 27.5% of respondents walk reflecting the classification of the most popular location for “top-up” shopping at a local store. 1% of respondents get public transport, 0.7% cycle and 0.5% of respondents noted that they have their top up shopping delivered.

- 4.4.24 In terms of the frequency of top up shopping, 21% of respondents stated that they visit a store for top up purposes on a daily basis, 61.6% of respondents noted that they do a top-up shop approximately 2 to 4 times a week. 16.8% of respondents carry out their top up shopping once a week and 0.5% carry out their top up shopping once a fortnight or less often and the remaining 0.1% of respondents stated that they “never” undertake top-up shopping.

Comparison Shopping

- 4.4.25 Respondents were asked which town, shopping centre, retail location or shop they would normally visit for their main clothes and footwear purchases or if they carry out their main comparison shopping on-line. The results are provided in Table 4.4.5.

- 4.4.26 The results to this question demonstrate a high level of comparison expenditure retention within the catchment area with 72.7% of respondents within the catchment area carrying out their main clothing and footwear purchases within the Metropolitan area. 98.4% of respondents who live within the Metropolitan area carry out their main comparison shopping within the Metropolitan area. Significant inflows of expenditure are also observed from the remainder of Cork County (66.9%) and the adjoining Counties of Waterford, Limerick, Tipperary and Kerry (13.4%).

- 4.4.27 The City Centre acts as the dominant location for comparison shopping within the catchment area and similar to the survey results indicated within the 2008 Cork Strategic Retail Study, the City has the largest market share in each of the identified zones. 44.8% of all respondents within the overall catchment area carry out their main comparison shopping within the City Centre. 59.8% of residents living within the Metropolitan area carry out their main clothing and footwear shopping within the City Centre and an inflow of 41.8% is observed from the remainder of the County and 9.7% from surrounding counties. The prominence of Cork City Centre as a comparison shopping location within the identified catchment area reflects the role of the City as a designated gateway within the NSS. The influence of the City on adjoining areas of surrounding counties such as Limerick, Waterford, Kerry and Tipperary is reflective of the quality, range and diversity of retail units provided within the City when compared with these centres.

- 4.4.28 Similar to the results of the household survey undertaken to inform the 2008 Cork Strategic Retail Study, Mahon Point Shopping Centre acts as the next most popular location for comparison shopping with 12.6% of all respondents within the overall catchment area carrying out their main comparison shopping at this location. 15.7% of respondents from the Metropolitan Area carry out their main shopping within Mahon Point. The centre attracts an inflow of 13.5% from County Cork and 3.2% from outside of County Cork.

- 4.4.29 The prominence of Wilton as a location for comparison shopping has increased significantly since the 2007 survey. The centre holds a market share of 4% and is ranked as the third most popular location for comparison shopping within the catchment area. Douglas also maintains a 3.3% market share within the Metropolitan area. Other suburban district

centres including Blackpool and Ballyvolane attain a higher market share than the Larger Metropolitan Towns.

	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative boundary	Total Metropolitan Area	Cork County Excluding Metropolitan Area	Catchment Area Outside Co. Cork- Waterford, Tipperary, Limerick & Kerry
Base	922	244	241	485	251	186
Within Metropolitan Area						
Cork City Centre	44.8%	65.2%	54.4%	59.8%	41.8%	9.7%
Mahon Point SC	12.6%	11.5%	19.9%	15.7%	13.5%	3.2%
Wilton SC	4.0%	7.0%	3.7%	5.4%	4.4%	
Douglas	3.3%	5.7%	5.8%	5.8%	0.8%	
Blackpool SC	1.8%	5.3%	0.8%	3.1%	0.8%	
Bishopstown	1.7%	1.6%	1.7%	1.6%	3.2%	
Ballincollig	1.2%		4.1%	2.1%	0.4%	
Ballyvolane	1.2%	2.9%		1.4%	1.2%	0.5%
Carrigaline	1.0%		3.7%	1.9%		
Midleton	1.0%		2.9%	1.4%	0.8%	
Cobh	0.1%		0.4%	0.2%		
Total within the Metropolitan Area	72.7%	99.2%	97.5%	98.4%	66.9%	13.4%
Outside Metropolitan Area						
North County Cork	2.3%	0.4%	0.4%	0.4%	6.8%	1.1%
West County Cork	5.6%				19.1%	2.2%
Co. Limerick	8.0%				1.2%	38.2%
Co. Kerry	4.4%				3.6%	17.2%
Co. Tipperary	3.1%		0.4%	0.2%		15.1%
Co. Waterford	2.7%				1.6%	11.3%
Other places in Ireland	0.2%				0.4%	0.5%
Dublin	0.1%					0.5%
Internet/Catalogues	0.8%	0.4%	1.7%	1.0%	0.4%	0.5%
Total outside the Metropolitan Area	27.3%	0.8%	2.5%	1.6%	33.1%	86.6%

Table 4.4.5: “Where do you carry out your main clothing/footwear shopping?” Note: *Table excludes non responses

4.4.30 Respondents were asked to state their main reasons for shopping at the store/location where they carry out their main clothing and footwear shopping. The results are presented in Table 4.4.6.

4.4.31 30.6% of respondents referred to “good value for money” 30.3% referred to “wide choice of goods” and 16.4% of respondents referred to “close to home”. The survey results indicate that respondents are willing to travel outside of their immediate catchment for their main clothes and footwear shopping to avail of a more varied product range. This significantly differs from the major reason identified for where people carry out their main food and

grocery shopping which is based on geographical proximity.

Comparison Shopping- Main Reason for Shopping at stated location	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Total Metropolitan Area	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Good Value for Money	30.6%	37.6%	29.1%	33.3%	27.8%	27.9%
Wide Choice of Goods	30.3%	24.8%	31.5%	28.2%	32.0%	32.8%
Close to Home	16.4%	15.2%	13.0%	14.1%	19.9%	16.7%
Good quality products	15.0%	18.4%	14.6%	16.5%	11.1%	17.2%
Close to other shops	3.2%	2.0%	4.7%	3.4%	3.3%	2.5%
Ease of Parking	1.9%	1.2%	2.4%	1.8%	2.9%	0.5%
Parking cheap/free	0.8%		1.6%	0.8%	0.7%	1.0%
Close to Work	0.3%		0.4%	0.2%	0.3%	0.5%
Good public transport	0.1%	0.4%		0.2%		
Other	1.6%	0.4%	2.8%	1.6%	2.0%	1.0%

Table 4.4.6: Main reason for shopping at clothing/footwear location

4.4.32 The majority of respondents surveyed (80%) travel by car to do their main clothing/footwear shopping (i.e. combination of drive self and passenger in car). 6.9% of respondents walk and 11.7% take the bus.

Mode of Transport Used	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Total Metropolitan Area	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Base	1003	250	250	500	301	202
Drive self in car/van	74.4%	48.4%	79.6%	64.0%	84.4%	85.1%
Bus	11.7%	23.6%	9.2%	16.4%	8.6%	4.5%
Walk	6.9%	19.2%	2.8%	11.0%	3.0%	2.5%
Passenger in car/van	5.6%	7.6%	4.8%	6.2%	3.7%	6.9%
Train	0.7%		1.6%	0.8%	0.3%	1.0%
Taxi	0.5%	0.4%	1.6%	1.0%		
Bicycle	0.3%	0.8%	0.4%	0.6%		

Table 4.4.7: Mode of transport used for comparison shopping

4.4.33 Respondents were asked how frequently they carry out their main comparison shopping. The results are illustrated in Figure 4.4.3 below. 25% of all respondents undertake their

shopping on a monthly basis and a further 20% carry out their comparison shopping once every two months.

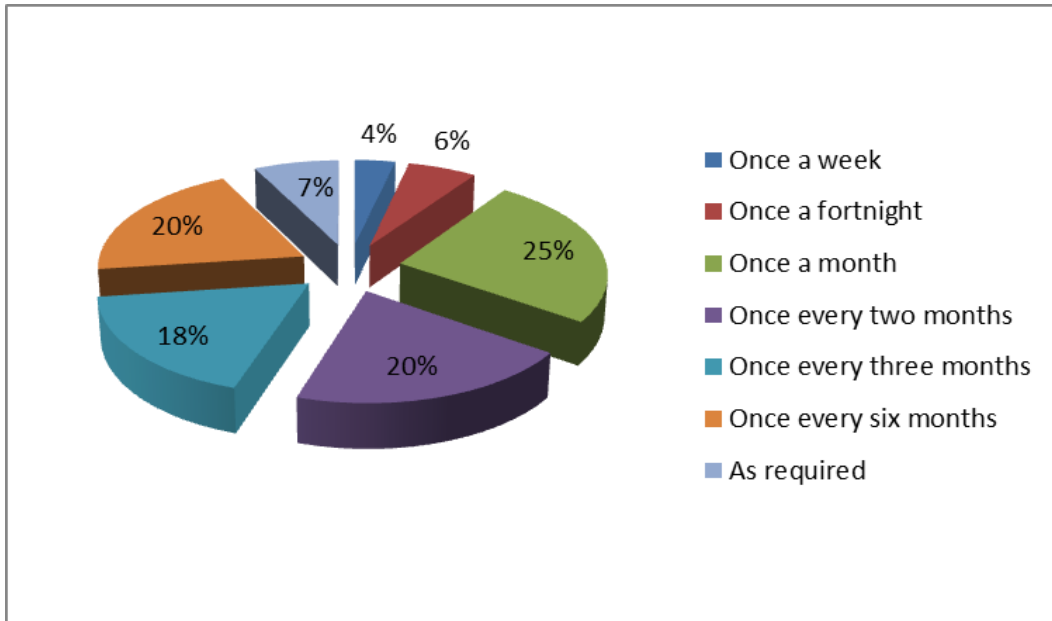


Figure 4.4.3 Frequency of shopping trips for comparison shopping

Comparison Satisfaction Rating

4.4.34 Respondents were asked if they were satisfied with where they carry out their main comparison shopping. The responses to this question displayed a high level of satisfaction, with 92.9% of respondents stating that they were either "very satisfied" or "satisfied" with where they carry out their main clothing and footwear shopping.

Comparison Satisfaction Rating	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Total Metropolitan Area	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Base	1014	250	254	504	306	204
Very Satisfied	28.6%	29.6%	30.7%	30.2%	30.4%	22.1%
Satisfied	64.3%	64.0%	60.2%	62.1%	63.7%	70.6%
Neither Satisfied nor Dissatisfied	4.8%	4.8%	6.7%	5.8%	2.9%	5.4%
Not Satisfied	2.2%	1.6%	2.4%	2.0%	2.9%	1.5%
Very Dissatisfied	0.1%					0.5%

Table 4.4.8: Comparison satisfaction rating

- 4.4.35 Of those who stated that they were either dissatisfied or very dissatisfied with where they carry out their main comparison shopping 74.3% referred to “poor range of goods”, 20% cited “too expensive”, 2.9% referred to “distance” and 2.9% of respondents referred to the “poor shopping environment”.

Bulky Goods Shopping

- 4.4.36 Respondents were asked to identify where they carried out their main bulky goods shopping. The definition of bulky goods was split between furniture and electrical goods within the questionnaire as many people would shop at different locations for these goods. The results are presented in Tables 4.4.9 and 4.4.10 below.

Furniture Shopping Location	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Total Metropolitan Area	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Total Sample	365	168	99	267	69	29
Metropolitan Area						
Cork City Centre	31.8%	35.1%	31.3%	33.7%	33.3%	10.3%
Kinsale Road	20.0%	24.4%	19.2%	22.5%	18.8%	
Blackpool SC	11.8%	18.5%	10.1%	15.4%	2.9%	
Mahon Point SC	4.7%	3.6%	7.1%	4.9%	5.8%	
Midleton	0.5%	0.6%	1.0%	0.7%		
Ballincollig	1.4%	1.8%	1.0%	1.5%	1.4%	
Tramore Road/Vicar Road	3.3%	5.4%	3.0%	4.5%		
Wilton SC	1.6%	1.2%	4.0%	2.2%		
Bishopstown	0.4%	0.0%	0.5%	0.3%	0.5%	0.6%
Total Within Metropolitan Area	75.5%	90.6%	77.2%	85.7%	62.7%	10.9%
Outside Metropolitan Area						
North County Cork	1.4%	2.4%		1.5%	1.4%	
West County Cork	2.5%		1.0%	0.4%	11.6%	
East Cork	9.6%	3.0%	20.2%	9.4%	13.0%	3.4%
Co Waterford	0.8%					10.3%
Co Tipperary	0.5%					6.9%
Co Limerick	4.4%					55.2%
Co Kerry	0.3%				1.4%	
Dublin	4.7%	3.6%	2.0%	3.0%	8.7%	10.3%
Other places in Ireland	0.3%					3.4%
Internet/Catalogues	0.3%				1.4%	
Total Outside Metropolitan Area	24.8%	9.0%	23.2%	14.3%	37.5%	89.5%

Table 4.4.9: Location for main bulky goods shopping - furniture

Electrical Shopping Location	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Total Metropolitan Area	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Base	695	161	184	345	203	147
Metropolitan Area						
Cork City Centre	14.2%	20.5%	19.0%	19.7%	12.3%	4.1%
Blackpool SC	10.9%	31.1%	8.7%	19.1%	4.9%	0%
Kinsale Road	6.9%	13.7%	8.7%	11.0%	4.9%	0%
Mahon Point SC	5.8%	12.4%	6.0%	9.0%	3.9%	0.7%
Midleton	4.3%	0.0%	12.5%	6.7%	3.4%	0%
Wilton SC	4.0%	6.2%	8.2%	7.2%	1.5%	0%
Ballincollig	3.7%	2.5%	10.3%	6.7%	1.5%	0%
Tramore Road/Vicar Road	1.6%	5.6%	1.1%	3.2%	0%	0%
Carrigaline	1.4%	0%	5.4%	2.9%	0%	0%
Douglas	1.2%	1.9%	1.1%	1.4%	1.5%	0%
Ballyvolane	0.7%	2.5%	0.5%	1.4%	0.0%	0%
All Metropolitan Area	54.8%	96.3%	81.5%	88.4%	34.0%	4.8%
Outside Metropolitan Area						
North County Cork	6.8%	0%	0.5%	0.3%	21.2%	2.0%
West County Cork	10.6%	1.9%	4.9%	3.5%	30.0%	0.7%
East Cork	7.1%	1.2%	12.5%	7.2%	10.3%	2.0%
Co Waterford	1.9%	0%	0%	0%	0%	8.8%
Co Limerick	9.1%	0%	0%	0%	2.5%	39.5%
Co Tipperary	4.9%	0%	0%	0%	0%	23.1%
Co Kerry	4.6%	0%	0%	0%	2.0%	19.0%
Other places in Ireland	0.1%	0.6%	0%	0.3%	0%	0%
Internet/Catalogues	0.1%	0%	0.5%	0.3%	0%	0%
All Outside Metropolitan Area	45.2%	3.7%	18.5%	11.6%	66.0%	95.2%

Table 4.4.10: Location for main bulky goods shopping - electrical

- 4.4.37 The survey results demonstrate high levels of retention of household goods expenditure within the Metropolitan Area (85.7% for furniture and 88.4% for electrical goods). Existing centres within the Cork City Council Area attain a higher market share in this category than Metropolitan Towns within the County Council administrative boundary.
- 4.4.38 Cork City Centre is listed as the most popular location for furniture and electrical goods shopping within the catchment area and this is followed by Kinsale Road and Blackpool. The main stores used within City Centre for furniture shopping include Casey's and Argos. Harvey Norman, Kinsale Road also acts as a significant attraction for both furniture and electrical shopping.

4.4.39 Outside of the Cork City Council Area, Midleton and Ballincollig are the only Metropolitan towns which are stated as locations within the furniture shopping category.

Main Reason for Shopping at Stated Location

4.4.40 Respondents were asked to state their main reasons for shopping at their main bulky goods shopping locations. The results are illustrated in Table 4.4.11. The main reasons were cited as “close to home” (33.9%) and “good value for money” (28.2%).

Main Reason	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Total Metropolitan Area	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Base	1014	250	254	504	306	204
Close to Home	33.9%	23.6%	35.0%	29.4%	36.9%	40.7%
Good Value for money	28.2%	36.0%	27.2%	31.5%	25.2%	24.5%
Wide choice of goods	15.5%	12.0%	17.3%	14.7%	18.3%	13.2%
Good quality products	14.0%	24.4%	12.6%	18.5%	9.8%	9.3%
Other	6.3%	1.6%	4.7%	3.2%	7.5%	12.3%
Ease of parking	1.2%	2.0%	1.6%	1.8%	1.0%	
Close to other shops	0.4%		0.8%	0.4%	0.7%	
Parking cheap/free	0.3%	0.4%	0.8%	0.6%		
Close to Work	0.1%				0.3%	
Good public transport	0.1%				0.3%	

Table 4.4.11: Main reason for shopping at bulky goods location

4.4.41 Table 4.3.12 below illustrates how 55.1% of all respondents surveyed travel by car (either as driver or passenger) to carry out their bulky goods shopping and a further 42.6% have their shopping delivered.

Mode of Transport	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Total Metropolitan Area	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Base	1014	250	254	504	306	204
Drive self in car/van	50.2%	38.8%	55.1%	47.0%	56.2%	49.0%
Delivery	42.6%	49.6%	39.4%	44.4%	38.9%	43.6%
Passenger in car/van	4.9%	8.4%	3.1%	5.8%	3.3%	5.4%
Walk	1.1%	2.4%	0.4%	1.4%	1.0%	0.5%
Bus	0.8%		1.6%	0.8%	0.7%	1.0%
Taxi	0.2%	0.8%		0.4%		
Train	0.1%		0.4%	0.2%		
Other	0.1%					0.5%

Table 4.4.12: Mode of transport used for bulky goods shopping

4.4.42 The majority of respondents, 82.3%, carry out their main bulky goods shopping “as required”. A further 10% stated “once every six months”. 5.6% stated “once a year”, 0.8% stated “once every 3 months”, 0.6% stated “once every two months”, 0.5% stated “once a month and 0.1% carry out their main bulky goods shopping “once a fortnight”.

Bulky Goods Satisfaction Rating

4.4.43 Respondents were asked if they were satisfied with where they carry out their shopping for bulky goods. The responses to this question displayed a high level of satisfaction, with 94.3% of respondents stating that they were either "very satisfied" or "satisfied" with where they carry out their main bulky goods shopping.

Bulky Satisfaction Rating	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Total Metropolitan Area	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Base	1014	250	254	504	306	204
Very Satisfied	18.0%	20.8%	17.7%	19.2%	18.0%	15.2%
Satisfied	76.3%	71.2%	76.0%	73.6%	76.8%	82.4%
Neither Satisfied nor Dissatisfied	3.1%	4.0%	3.1%	3.6%	2.6%	2.5%
Not Satisfied	2.4%	4.0%	2.8%	3.4%	2.3%	
Very Dissatisfied	0.2%		0.4%	0.2%	0.3%	

Table 4.4.13: Bulky goods satisfaction rating

4.4.44 Of the respondents who stated that they were either dissatisfied or very dissatisfied with where they carry out their main comparison shopping 72.7% referred to “poor range of goods”, 18.2% of respondents referred to the “poor shopping environment” and 9.1% cited “too expensive”.

Shopping at Ikea

4.4.45 The household survey aimed to identify if Ikea in Dublin acts as an attraction for residents within the catchment area. The results highlighted on Table 4.4.14 below identify that 16.9% of all those surveyed have travelled to Ikea. However, visits are very infrequent.

	Total	Cork City	Rest of Metropolitan Area	Total Metropolitan Area	Rest of Co Cork	Outside County Cork
Base	1014	250	254	504	306	204
Yes	171	42	52	94	45	32
	16.9%	16.8%	20.5%	18.7%	14.7%	15.7%
No	843	208	202	410	261	172
	83.1%	83.2%	79.5%	81.3%	85.3%	84.3%

Table 4.4.14: Shopping in Ikea

4.4.46 In terms of frequency of visits to Ikea, the majority of those surveyed had travelled to Ikea

once (65.8%) or twice (21.1%).

Frequency of Visits to Ikea	Total	Cork City	Rest of Metropolitan Area	Total Metropolitan Area	Rest of County Cork	Outside County Cork
Base	161	41	48	89	43	29
Once	106	30	26	56	34	16
	65.8%	73.2%	54.2%	62.9%	79.1%	55.2%
Twice	34	6	14	20	7	7
	21.1%	14.6%	29.2%	22.5%	16.3%	24.1%
Three times	15	5	4	9	1	5
	9.3%	12.2%	8.3%	10.1%	2.3%	17.2%
Four times	5		3	3	1	1
	3.1%		6.3%	3.4%	2.3%	3.4%
Five times or over	1		1	1		
	0.6%		2.1%	1.1%		

Table 4.4.15: Frequency of shopping at Ikea

Competing Centres

- 4.4.47 Respondents were asked if they travel to centres outside of Cork City for shopping purposes. The results are illustrated in Table 4.4.16 below. 17% of all respondents travel to Killarney for shopping purposes. However it is clear that the centre acts as a more significant attraction from the areas of the catchment outside of the Metropolitan Area. A similar trend is observed from the respondents who travel to Limerick, whereby only 4% of respondents who live within the Cork City Council Area travel to Limerick for shopping purposes compared with 41% of respondents from the area of the catchment outside of County Cork.
- 4.4.48 By contrast, Dublin acts as an attraction across all areas of the catchment with 15% of all respondents within the catchment area travelling to this centre. This is reflective of the role of Dublin City Centre within the national retail hierarchy.

Location Visited	Total	Cork City Administrative Boundary	Metropolitan Area excluding Cork City Administrative Boundary	Cork County excluding Metropolitan Area	Catchment Area Outside County Cork - Waterford, Tipperary, Limerick & Kerry
Killarney	17%	12%	6%	25%	27%
Dublin	15%	14%	11%	18%	20%
Limerick	12%	4%	3%	6%	41%
Tralee	8%	4%	1%	9%	4%
Kildare Village	7%	8%	3%	8%	11%
Clonmel	5%	0%	1%	3%	19%
Waterford	5%	4%	3%	3%	10%

Table 4.4.16: Competing centres

4.4.49 Respondents were also asked how often they visited other centres for shopping purposes. The results are illustrated on Table 4.4.17 below. This revealed that the majority of respondents that do travel to competing centres do so on an infrequent basis with the highest percentage of respondents visiting these centres “once or twice a year” or “only once”.

Location	Once a Week or more often	Once a fortnight	Once a month	Once or twice a year	Only once
Dublin	1.3%	1.3%	7.7%	34.6%	55.1%
Waterford	2.0%	4.1%	12.2%	28.6%	53.1%
Limerick	11.9%	12.7%	28.0%	28.8%	18.6%
Kildare Village	1.3%	2.7%	6.7%	33.3%	56.0%
Clonmel	9.6%	3.8%	23.1%	34.6%	28.8%
Killarney	12.4%	6.2%	12.4%	32.8%	36.2%
Tralee	12.2%	1.2%	22.0%	26.8%	43.9%

Table 4.4.17: Frequency of visits to competing centres

4.4.50 Respondents were then asked to determine the nature of their visits to competing centres in terms of whether it was for food, clothes or bulky goods purchases. The results are illustrated in Table 4.4.18 below. This illustrates that the majority of respondents primarily travel to centres outside of the catchment area for comparison shopping.

Main Purpose of Visits			
Location	Convenience	Comparison	Bulky Goods
Dublin	1.3%	96.8%	3.2%
Waterford	4.1%	95.9%	0.0%
Limerick	13.6%	83.1%	4.2%
Kildare Village	2.7%	98.7%	1.3%
Clonmel	17.3%	78.8%	3.8%
Killarney	14.7%	84.7%	0.6%
Tralee	6.1%	90.2%	3.7%

Table 4.4.18: Main Purpose of trips to competing centres

4.4.51 The results to these questions on competing centres coupled with the high expenditure retention levels for comparison shopping as evidenced from the household survey results demonstrate the prominence of Cork City as a main centre for comparison shopping in line with its designation as a Gateway City within the NSS.

Comparison with Survey Results included within the 2008 Cork Strategic Retail Study

4.4.52 The following paragraphs provides an overview of the key expenditure retention results for convenience and comparison goods from the survey undertaken in 2007 to inform the Cork Strategic Retail Study and compares these with the results obtained from the household telephone survey undertaken by Demographics Ireland to inform this current Retail Study.

4.4.53 For the purposes of this comparison an amendment is made to the categorisation of the survey zones identified within the household survey. In accordance with the approach adopted within the 2008 Retail Study the City Centre zone is extended to include the Douglas ED and this ED is removed from the Rest of the Metropolitan Area Category. This adjustment facilitates a direct comparison to be made between the 2007 survey and the 2012 results. The following trends are observed in relation to convenience and comparison shopping trends.

Convenience Expenditure Trends

- There has been a slight increase in the retention levels for the City Centre and Douglas between 2007 and 2012 - 0.3%, while a more significant increase in expenditure retention is observed within the rest of the Metropolitan area category from 97.3% in 2008 to 99.6% in 2012.
- In accordance with the 2007 survey results, Douglas maintains its position as the centre with the highest market share in the 2012 survey results. While the centre remains the most frequented centre in the 2012 survey results the market share has decreased from 30.6% in 2007 to 18.4% in 2012 within the City Centre and Douglas zone. By contrast the market share of Douglas within the remainder of the Metropolitan zone has increased from 8.4% in 2007 to 10.9 % in 2012.
- The City Centre market share has decreased within the City and Douglas zone from 18% in 2007 to 14.1% in 2012. The market share of Mahon Shopping Centre has also decreased within the City and Douglas zone from 6.7% in 2007 to 4% in 2012. By contrast the performance of other district centres and local neighbourhood centres has increased within the City and Douglas area since 2007.
- Within the remainder of the Metropolitan area, Midleton and Ballincollig attain the highest market shares in 2012. The market share of Ballincollig has increased from 13.1% in 2007 to 20.1% in 2012 and Midleton has increased from 14.9% in 2007 to 18.8% in 2012. By contrast the market share of Carrigaline has decreased from 18.6% in 2007 to 11.8% in 2012.

Comparison Expenditure Trends

- The 2007 study identifies that the City Centre maintains an overall market share of 55% within Cork County. A comparable figure from the 2012 survey results identifies an overall share of 53.7% for the City Centre within the County.
- The 2007 survey identifies comparison expenditure retention levels of 96.3% within the City and Douglas zone and 95.4% within the remainder of the metropolitan area zone. Retention levels have increased within these zones to 99.2% and 97.4% respectively in the 2012 results.
- The City Centre market share within the City and Douglas category has increased from 62.5% in 2007 to 64.5% in 2012. However the City's market share within the remainder of the metropolitan area excluding the City and Douglas zone appears to have decreased from 57.6% in 2007 to 54.6% in 2012. Mahon retains its overall position as the second most popular centre for comparison shopping below the City Centre within the 2012 survey results. The market share of Mahon has decreased within the City and Douglas zone (from 13.8% in 2008 to 11.7% in 2012) and

- increased within the rest of the Metropolitan Area zone (from 14.5% to 20.1%).
- A notable difference between the 2007 and 2012 survey results is observed within the market share of Douglas. The 2007 results recorded a market share of 12% for Douglas within the City and Douglas category and 6.8% within the rest of the Metropolitan area. This has decreased to 7% within the City and Douglas zone and 4.4% within the remainder of the Metropolitan Area. By contrast the market share of Wilton appears to have significantly increased since the 2007 survey from 2.1% in 2007 to 6.6% in 2012 within the City and Douglas zone and 2.8% in 2008 to 3.9% in 2012 within the rest of the Metropolitan area zone.

Household Survey Conclusion

- 4.4.54 The household survey covered the topics of convenience, comparison, top-up and bulky household goods shopping. On an overall basis the survey results demonstrate the prominence of the Larger Metropolitan Towns and Suburban District Centres as main locations for food and grocery shopping. Douglas and Midleton exert a significant influence in this regard.
- 4.4.55 The exception in this instance is the performance of Mahon Shopping Centre and Cobh town which do not maintain a similar market share to the other designated Level 2 centres. In the case of Mahon, it is considered that this trend could be as a result of the lack of a significant residential catchment close to the centre whereas the limited provision of convenience floorspace within Cobh, together with its geographical location, could provide the rationale for its limited market share.
- 4.4.56 The Metropolitan Area also retains a significant proportion of comparison expenditure with 98% of all respondents who live within the Metropolitan Area carrying out their main comparison shopping within this area. Significant inflows of expenditure into the Metropolitan Area are also observed from the remainder of County Cork and the adjoining Counties. In accordance with its designation as a gateway, Cork City Centre acts as the primary location for comparison shopping within the catchment area. The second most popular location in the Metropolitan Area is Mahon Point Shopping Centre. This trend is in accordance with the 2007 survey results contained in the 2008 Cork Strategic Retail Study.
- 4.4.57 The survey results also demonstrate a high level of satisfaction with the existing convenience, comparison and bulky goods floorspace within the Metropolitan Area and demonstrate limited leakage of expenditure to competing centres.

4.5 Shopper's Survey

- 4.5.1 The purpose of the shopper's survey is to provide a profile of the people who visit the main towns and centres in the Metropolitan Area for shopping purposes. The shopper's survey helps to analyse the shopping patterns of people who visit the Cork Metropolitan Area and determines expenditure inflows to the area. It also provides an opportunity to ascertain more qualitative feedback from respondents on what they would determine as the key attractions and improvements needed to a particular centre.

Survey Questions

4.5.2 The principal questions in the shopper’s survey were as follows:

- Where the respondent came from?
- Main purpose of trip to centre in which survey was being undertaken?
- Main mode of travel to centre in which survey was being undertaken?
- Frequency of visits to relevant centre to shop?
- Main reasons for travelling to centre in which survey was being undertaken?
- The main shopping centres/shopping streets frequented in the town in which survey was undertaken?
- The main attractions of the centre?
- What improvements are needed in the centre?

4.5.3 In assessing the result of the shopper’s survey it is important to have regard to the number of surveys which were undertaken in each area. While on an overall basis over 1,000 surveys were undertaken throughout the Metropolitan Area, these surveys were distributed between the different settlements within the Metropolitan area. In the interpretation of the results regard should be had to the overall sample size for that area. Notwithstanding this, the survey results are useful in providing more qualitative feedback on individual centres within the Metropolitan Area. A summary of the survey results is provided as follows.

Where Respondents Were From

4.5.4 Table 4.5.1 below demonstrates how different levels of inflow are experienced between the survey areas. At 21.1% Cork City Centre has a relatively high percentage of visitors from outside of the Metropolitan Area. The City Centre also attracts the highest inflow of respondents from adjoining Counties of Limerick, Tipperary, Kerry and Waterford (5.9%) and from outside of the catchment area (3.6%). While Blackpool district centre also has an inflow of 21.1%, this inflow is primarily attributed to an inflow from the zones which immediately adjoin the Metropolitan Area to the north and is reflective of the small sample taken in this area.

4.5.5 The survey results further indicate high inflows from the remainder of Cork County outside of the Metropolitan Area to the Large Metropolitan Towns of Ballincollig (18.6%) and Midleton (9.1%) and the suburban district centres demonstrating the role of these centres within a wider hinterland. By contrast the survey identifies limited inflows into Carrigaline and Cobh.

Where are you from?									
Survey Location	Cork City Centre	Mahon S.C.	Blackpool	Wilton S.C.	Douglas	Ballincollig	Carrigaline	Cobh	Midleton
Base	476	77	104	102	118	59	55	52	55
Cork City	37.4%	40.3%	33.7%	44.1%	33.1%	10.2%	1.8%	3.8%	3.6%
Rest of Metropolitan Area	41.6%	46.8%	45.2%	39.2%	61.0%	71.2%	98.2%	94.2%	85.5%
Total Metropolitan Area	79.0%	87.0%	78.8%	83.3%	94.1%	81.4%	100.0%	98.1%	89.1%
Rest of County Cork	11.6%	10.4%	16.3%	10.8%	5.1%	18.6%			9.1%
Rest of Catchment Area	5.9%	1.3%	1.9%	2.9%	0.8%				
Outside of Catchment Area	3.6%	1.3%	2.9%	2.9%				1.9%	1.8%
Total Outside of Metropolitan Area	21.1%	13.0%	21.1%	16.6%	5.9%	18.6%	0%	1.9%	10.9%

Table 4.5.1: “Where are you from?”

Main Reason for Visiting the Centre

4.5.6 Respondents were asked to state their main purposes for their trip to each centre. The results are presented in Table 4.5.2 below. While on an overall basis, 27% of all respondents noted that their main reason for visiting the centre was main grocery shopping, the survey results vary throughout the catchment area as illustrated in the table below. For example, the highest percentage of respondents who were surveyed in the City Centre (34.2%) and Mahon Shopping Centre (28.6%) were in these centres for comparison shopping purposes. A further 19.8% of respondents interviewed within the City Centre and 18.2% of respondents interviewed within Mahon Shopping Centre were “browsing around the shops”. The results for Cork City identify its role as the main centre for comparison shopping within the catchment area and the high proportion of respondents who were carrying out comparison shopping within Mahon demonstrate the role of this district centre as an important location for comparison shopping. The results obtained for Mahon reflect those identified within the household survey in terms of the role of Mahon as a comparison centre.

4.5.7 By contrast with Mahon, the highest percentage of respondents visiting the suburban district centres of Blackpool (54.6%), Wilton (21.9%) and Douglas (45.8%) were carrying out their main food and grocery shopping at these locations. This trend is also reflected within the Metropolitan towns of Ballincollig, Cobh, Midleton and Carrigaline.

	Total	Cork City Centre	Mahon S.C.	Blackpool S.C.	Wilton S.C.	Douglas S.C.	Ballincollig	Carrigaline	Cobh	Midleton
Base	1117	486	77	108	105	118	60	55	52	56
Main Grocery Shopping	27.0%	14.2%	18.2%	54.6%	21.9%	45.8%	21.7%	38.2%	28.8%	60.7%
Clothing and Footwear Shopping	20.8%	34.2%	28.6%	5.5%	20.1%	5.9%	15.1%	3.6%		
Browsing around Shops	15.5%	19.8%	18.2%	16.7%	11.4%	10.2%	8.3%	5.5%	19.2%	5.4%
Banking/Financial Services	5.1%	1.6%		1.9%	7.6%	6.8%	8.3%	14.5%	25.0%	8.9%
Socialising	4.9%	7.4%	1.3%	2.8%	1.0%	5.9%	3.3%	3.6%	1.9%	3.6%
On Business	4.7%	6.2%	1.3%	0.9%	4.8%	2.5%		16.4%	5.8%	1.8%
Miscellaneous	4.3%	3.7%		6.5%	5.7%	3.4%	1.7%	3.6%	11.5%	5.9%
Eating Out	3.8%	2.3%	3.9%	5.6%	7.6%	2.5%	13.3%	3.6%	1.9%	1.8%
Other grocery shop	2.8%	1.6%		1.9%	4.8%	8.5%	6.7%	1.8%		1.8%
Hair/beauty	2.2%	2.3%	5.2%		1.9%	2.5%	3.3%	1.8%		3.6%
Other shopping	2.2%	1.0%	3.9%	0.9%	5.7%	2.5%	5.0%		3.8%	3.6%

Other Reasons for Visiting the Centre

- 4.5.8 Respondents were also asked to state their other reasons for visiting each centre. Other reasons stated for visiting each centre included “browsing around the shops” (37.7%), “eating out” (15.8%) and “other grocery shop” (10.2%).

Method of Travel

- 4.5.9 The majority of respondents surveyed (62.3%) stated that they had travelled to the centre via car, 22.4% of respondents walked, 12.6% got a bus, 0.9% travelled to the centre on bicycle.
- 4.5.10 The prominence of the car as the main mode of transport varies across the catchment area. 50.6% of respondents within Cork City, 30.8% of respondents within Cobh and 48.2% of respondents within Midleton travel to these centres via car. However, a higher percentage of respondents travel via car to Mahon (83.1%) and Wilton (80%).
- 4.5.11 The highest percentage of public transport use (24.1%) is observed in Cork City Centre. The percentage of respondents who walk to Mahon Shopping Centre (7.8%) is also significantly lower than trends observed within other district centres surveyed.

	Total	Cork City Centre	Mahon S.C.	Blackpool S.C.	Wilton S.C.	Douglas S.C.	Ballincollig	Carrigaline	Cobh	Midleton
Base	1117	486	77	108	105	118	60	55	52	56
Car	62.3%	50.6%	83.1%	73.1%	80.0%	78.0%	83.3%	69.1%	30.8%	48.2%
Walk	22.4%	22.0%	7.8%	21.3%	15.2%	14.4%	16.7%	27.3%	57.7%	46.4%
Bus	12.6%	24.1%	6.5%	3.7%	2.9%	6.8%		3.6%		3.6%
Other	1.8%	2.3%	1.3%	1.9%					11.5%	
Bicycle	0.9%	1.0%	1.3%		1.9%	0.8%				1.8%

Table 4.5.3: Method of travel

Frequency of Visits

4.5.12 Respondents were asked how frequently they visit the centres within the Metropolitan Area to shop or look around the shops. The results are illustrated in Table 4.5.4 below.

4.5.13 On an overall basis, the highest percentage of respondents (34.7%) visit the surveyed centres more than 3 times a week. Higher percentages of respondents within the Large Metropolitan towns of Ballincollig (53.6%), Carrigaline (60%), Cobh (57.7%) and Midleton (62.5%) are observed to visit these centres 2 to 3 times a week. By contrast the highest percentage of respondents who visit the City Centre (27.8%) and Mahon Shopping Centre (24.7%) visit these centres once a week.

Frequency of Visits	Total	Cork City Centre	Mahon S.C.	Blackpool S.C.	Wilton S.C.	Douglas S.C.	Ballincollig	Carrigaline	Cobh	Midleton
Base	1117	486	77	108	105	118	60	55	52	56
More than 3 times a week	34.7%	27.4%	16.9%	38.9%	26.7%	35.6%	53.3%	60.0%	57.7%	62.5%
Twice a week	17.5%	12.3%	20.8%	20.4%	22.9%	29.7%	10.0%	27.3%	23.1%	8.9%
Once a week	21.9%	27.8%	24.7%	13.0%	20.0%	19.5%	18.3%	9.1%	9.6%	21.4%
2 to 3 times a month	9.8%	11.7%	19.5%	8.3%	10.5%	5.1%	11.7%	1.8%	3.8%	1.8%
Once a Month	8.1%	10.7%	9.1%	6.5%	9.5%	5.9%	3.3%		5.8%	3.6%
Once every 2 months	3.6%	3.7%	3.9%	6.5%	4.8%	2.5%	3.3%	1.8%		1.8%
Less often	4.5%	6.4%	5.2%	6.5%	5.7%	1.7%				

Table 4.5.4: Frequency of visits to each centre

Main Attractions of the Centre

4.5.14 Respondents were asked to identify what they felt were the main attractions of each centre. “Close to home” (44.4%), “attractive shopping environment” (24.8%) and “good choice of clothing and footwear shops” (23.7%) were ranked as the top three reasons for visiting centres within the Metropolitan Area.

4.5.15 When these results are split between the individual survey locations it is clear that the main attraction of Cork City Centre relates to the range of comparison stores provided (37.7%). “Attractive shopping environment” (35.8%) and “pedestrianised streets” (18.3%) also ranked highly within the City Centre when compared with other survey locations, while “close to home” is much less important when compared with the other survey locations. The main attractions to Mahon Point Shopping Centre included “ease of getting there by car” (45.3%) and “free parking” (37.3%). The remainder of survey locations all rank “close to home” as being the main attraction of these centres.

Main Attractions	Total	Cork City Centre	Mahon S.C.	Blackpool S.C.	Wilton S.C.	Douglas S.C.	Ballincollig	Carrigaline	Cobh	Midleton
Base	1092	480	75	98	101	117	60	55	50	56
Close to Home	44.4%	28.3%	32.0%	57.1%	46.5%	50.4%	70.0%	72.7%	94.0%	60.7%
Attractive Shopping Environment	24.8%	35.8%	24.0%	8.2%	12.9%	14.5%	35.0%	20.0%	14.0%	7.1%
Good choice of clothing and footwear shops	23.7%	37.7%	18.7%	12.2%	23.8%	9.4%	3.3%	1.8%	2.0%	23.2%
Parking Free	22.6%	1.0%	37.3%	32.7%	57.4%	30.8%	71.7%	27.3%	4.0%	50.0%
Good choice of department/variety stores	20.2%	24.8%	20.0%	12.2%	12.9%	13.7%	31.7%	25.5%	8.0%	16.1%
Easy to get to by car	18.5%	13.1%	45.3%	25.5%	20.8%	17.9%	28.3%	9.1%	2.0%	26.8%
Good choice of places to eat/drink	17.8%	23.3%	20.0%	7.1%	12.9%	7.7%	11.7%	18.2%	16.0%	62.2%
Ease of parking	12.9%	6.9%	21.3%	19.4%	24.8%	24.8%	6.7%	23.6%	2.0%	1.8%
Particular Store	12.3%	12.1%	14.7%	21.4%	6.9%	22.2%	3.3%	7.3%	8.0%	1.8%
Easy to get to by bus	11.0%	20.2%	8.0%	1.0%	5.0%	5.1%		1.8%		7.1%
Good choice of cheap/discount shops	9.8%	9.6%	8.0%	3.1%	13.9%	7.7%	10.0%	12.7%	2.0%	26.8%

Suggested Improvements

4.5.16 Respondents were asked to identify what improvements would encourage them to shop in each centre on a more regular basis. A range of improvements are listed by the respondents with issues such as “more shops”, “more cafes and restaurants” and “cheaper/free parking”. The requirement for “cheaper/free parking” and “more pedestrianised streets” ranks highest in the City Centre while the requirement for “more shops” is ranked highest within all the suburban district centres and the Large Metropolitan Towns of Ballincollig and Cobh. The requirement for “improved access by car” (38.2%) is ranked as the most prominent improvement in Carrigaline.

Suggested Improvements	Total	Cork City Centre	Mahon S.C.	Blackpool S.C.	Wilton S.C.	Douglas S.C.	Ballincollig	Carrigaline	Cobh	Midleton
Base	1076	482	75	96	104	107	60	55	44	53
More Shops	29.6%	22.6%	17.3%	36.5%	49.0%	36.4%	51.7%	12.7%	40.9%	28.3%
More cafes and restaurants	16.8%	18.0%	8.0%	12.5%	17.3%	18.7%	30.0%	14.5%	13.6%	11.3%
Cheaper/free parking	15.4%	31.5%		1.0%	1.9%	0.9%	1.7%	1.8%	18.2%	
More public toilets	15.1%	21.0%	1.3%	1.0%	14.4%	20.6%	6.7%	3.6%	2.3%	30.2%
More designer shops/boutiques	12.4%	10.8%	8.0%	14.6%	18.3%	8.4%	31.7%	10.9%	4.5%	11.3%
More events	11.3%	14.3%	5.3%		3.8%	10.3%	18.3%	23.6%	4.5%	15.1%
More seating areas	11.0%	14.5%	4.0%	1.0%	9.6%	10.3%	5.0%	20.0%	6.8%	11.3%
More cash machines	9.8%	12.0%	4.0%	3.1%	14.4%	8.4%	21.7%	5.5%	2.3%	
More parking	8.1%	8.5%		2.1%	14.4%		3.3%	5.5%	38.6%	13.2%
Improved access by car	6.5%	4.1%	2.7%	5.2%	5.8%	8.4%	1.7%	38.2%	9.1%	3.8%
More pedestrianised streets	6.0%	10.0%			1.0%	0.9%	3.3%	3.6%	2.3%	18.9%
Improve cleanliness	5.2%	7.3%	2.7%	4.2%	1.9%			20.0%		3.8%
More facilities for the disabled	4.8%	5.8%		2.1%	4.8%	2.8%	5.0%	7.3%		13.2%
Improvements to the streetscape/environment	4.7%	4.8%		3.1%	2.9%	0.9%		10.9%	13.6%	62 17.0%
More leisure facilities	4.7%	3.3%	4.0%	2.1%	2.9%	1.9%	11.7%	10.9%	11.4%	13.2%
Better public transport	4.2%	3.9%	2.7%	2.1%	2.9%	1.9%	8.3%	16.4%		5.7%
More Shopping Malls/Centres	3.1%	2.3%	1.3%	2.1%	7.7%	0.9%	8.3%			9.4%
Improve safety/securiy in daylight	2.9%	4.4%			1.9%	0.9%		7.3%		5.7%

Comparison with Retail Excellence Ireland Survey Results

- 4.5.17 Retail Excellence Ireland commissioned a review of town and City Centre performance in 2012. A nationwide survey of stakeholders and the public was undertaken to obtain views on the performance of various town and city centres under a number of separate categories. From this, the top 100 towns/cities within the Country are identified.
- 4.5.18 The survey results include details on a number of settlements within the Cork Metropolitan Area. Cobh was ranked 19th (with a score of 71.8%) within the top 100 Cities/Towns classification, Midleton was ranked 22nd (with a score of 71.21%) and Cork City was ranked 23rd (with a score of 70.78%). Carrigaline is ranked as no. 30 within the top 100 towns. An overall score is not given for the town as this is only provided for the top 25 towns.
- 4.5.19 The REI Survey Results include specific results on the performance of the settlements listed within the top 100 category. Further details for Cork City, Carrigaline, Cobh and Midleton are provided below.

Cork City Centre

- 4.5.20 Cork City Centre ranked highly in the categories of safety and security (85-90%), large number of quality restaurants and pubs (75-80%) and the City is well presented and maintained (75-80%). These results in part reflect those obtained for the shoppers' survey wherein the category of attractive shopping environment was ranked highly as an attraction to the City Centre.
- 4.5.21 The lower ranked categories within the City Centre included "number of car parking spaces available" (60-65%) and "there is a lot to do and see in the city" (60-65%). Only 8.5% of respondents to the shopper's survey undertaken by Demographics Ireland required the provision of more car parking spaces within the city while the requirement for cheaper/free parking was a key priority in the survey results (31.5%).
- 4.5.22 Cork City Centre is ranked highly by stakeholders in the "town product" category which encapsulates retail, dining and things to do. The City obtains a score of 83.81% in this category and is ranked no. 8 in the top 10 towns in this category.

Carrigaline

4.5.23 Carrigaline was rated highly within the REI survey in terms of safety and security (80% to 85%) and also within the large number of quality retail stores to choose from (75%-80%). Lack of things to see and do, family friendliness and unique and attractive streetscape were all ranked below 60% in the survey results.

4.5.24 The REI survey results for Carrigaline are reflected within the survey results undertaken by Demographics Ireland in terms of the suggested improvements to the town. Key improvements suggested for Carrigaline within the survey undertaken by Demographics Ireland include improvements to the streetscape/environment (10.9%) and improved cleanliness (20%). However, in contrast with the REI survey the requirement for “more shops” at 23.6% (i.e. combination of the more shops category and more designer shops/boutiques) ranked highly as an improvement for the centre.

Cobh

4.5.25 Cobh was rated highly in the REI survey in the “safety and security” category (90-95%), “frequency of events and promotions being run in the town” (90-95%) and “unique and attractive streetscape” (85%-90%). These reflect the results of the household survey undertaken to inform the retail study wherein the reference to “attractive shopping environment” was ranked as a key attraction to the town centre.

4.5.26 Cobh is also ranked highly in the stakeholder category of town promotion, events and general image. Cobh received a score of 84.65% in this category and is ranked no. 10 in the top 10 towns in this category.

4.5.27 The categories which were ranked the lowest in Cobh included “abundance of car parking spaces” (50-55%), “large number of quality retail stores to choose from” (55-60%) and “first choice destination for shopping” (55-60%). These reflect the results of the shoppers survey undertaken to inform the retail study where the requirements for “more shops” (40.9%) and “more parking” (38.6%) were listed as key improvements for the town. The reference in the low rating of the “first choice destination” for the town within the REI survey is reflective of the low market share of the town, particularly for comparison retailing as demonstrated within the household survey results.

Midleton

4.5.28 Safety and security (80-90%), quantum of quality restaurants and pubs (80-90%) and competitively priced car parking (70-80%) all ranked highly within Midleton in the REI survey. These attractions reflect those identified within the Demographics Ireland shopper’s survey results.

4.5.29 The categories which were ranked the lowest in the town included “there is a lot to see and do” (50-60%) and “quantum of car parking spaces available” (60%). The requirement for more parking and more events are listed as a key improvement within the shopper’s survey results undertaken to inform the retail study. The requirement for more events also features as a suggested improvement within the shopper’s survey.

REI and Demographics Ireland Survey Comparison Conclusion

4.5.30 On an overall basis, the results of the Retail Excellence Ireland Survey broadly reflect those of the household and shopper’s survey undertaken by Demographics Ireland to inform the retail study. However, the overall ranking of Cobh ahead of other Metropolitan centres such as Cork City Centre and Midleton within the Retail Excellence Ireland survey is not reflected within the shopper’s survey or household survey undertaken to inform the retail study. Cork City Centre and Midleton attain a higher retail market share in both the convenience and comparison goods category.

Shopper’s Survey Conclusion

4.5.31 The results of the shopper’s survey identify inflows of expenditure to the individual centres within the Metropolitan Area. In accordance with its role as a Gateway, the survey results identify the highest levels of inflows from centres outside of County Cork to Cork City Centre.

4.5.32 The survey results are also helpful in identifying the role of the City Centre, suburban district centres and Large Metropolitan Towns within the Metropolitan Area. While on an overall basis the main attraction to the surveyed areas is grocery shopping, both Cork City Centre and Mahon Point Shopping Centre attract the highest proportion of respondents carrying out their main comparison shopping and browsing around the shops. The role of these centres as main comparison locations reflects the results obtained from the household survey.

4.5.33 The key attractions to the centres within the County were identified as “close to home”, “parking free” and easy to get there by car”. The need for “more shops” ranked highly in the suggested improvements to each of the centres.

4.6 Consultation

4.6.1 In addition to carrying out the household and shopper surveys, an integral part of the study was to undergo consultation with key stakeholders. The following section provides a summary of the main consultation undertaken to inform the retail study.

Public Notices

4.6.2 A notice requesting pre-draft submissions on the Joint Retail Study was placed in the Irish Examiner and on the website of Cork City Council and Cork County Council. In addition, key stakeholders were written to inviting submissions.

4.6.3 Submissions were received from the following:

- Cunnane Stratton Reynolds on behalf of O’ Callaghan Properties
- Cunnane Stratton Reynolds on behalf of Deka Immobilien Investment Gmbh Ltd
- McCutcheon Halley Walsh on behalf of Donncha Loftus
- Shipton Services Ltd
- Coakley O’ Neill on behalf of Douglas Developments Ltd

- Cunnane Stratton Reynolds on behalf of Ballyvolane Development Company Ltd
- McCutcheon Halley Walsh on behalf of McCarthy Developments Ltd

4.6.4 The content of these submissions were considered in drafting the retail study. A summary of these submissions is provided in Appendix 1.

Key Stakeholders

4.6.5 A number of key stakeholders including the Cork Business Association, Cork Chamber of Commerce, Cobh and Harbour Chamber of Commerce, Blarney Chamber of Commerce and Middleton and Area Chamber of Commerce. Submissions were received from the Cork Chamber and Cork Business Association. The following points were raised within these submissions.

Cork Chamber

- Floorspace caps should remain at levels which are conducive to maintaining competition, whilst also recognising significant changes in the sector in recent years.
- Concern regarding cost of rates. Welcomes initiatives such as the ring fencing of 1% of rates for economic development and states that such an allocation should be expanded and improved.
- Supports the “Adopt a Road Scheme”. Supports initiatives which encourage partnership between business and the community which benefits the Cork region.
- Support the development of a high quality transport system and any measures to improve accessibility to the retail environment and business opportunities in the city.
- Suggest a number of measures to increase mobility including enhanced parking information, promotion of park by phone system, introduction of parking metres, marketing of the park and ride facility at Black Ash, introduction of further park and ride facilities and the promotion of car sharing among commuters.

Cork Business Association

- The main threat to the City is the four suburban district centres.
- That Cork City Centre has to be the preferred location for future development.
- CBA support the future development of the Docklands.
- Significant improvement in transport infrastructure is essential to maintaining the viability of the City Centre.

CHAPTER 5: HEALTH CHECK ASSESSMENT

5.1 Introduction

5.1.1 This section of the report provides an overview of the retail profile and health check assessment of Cork City Centre and the main urban centres in the Metropolitan Area. At the outset of the preparation of the Study, Cork County Council and Cork City Council identified the following centres where health checks should be undertaken. These include:

- 1 Cork City Centre
- 2 Mahon Point
- 3 Blackpool
- 4 Wilton
- 5 Ballyvolane
- 6 Douglas
- 7 Middleton
- 8 Cobh
- 9 Ballincollig
- 10 Carrigaline
- 11 Blarney
- 12 Carrigtwohill
- 13 Glanmire
- 14 Passage West

5.1.2 A brief survey of the principal neighbourhood centres and retail warehouse parks in the City suburbs was also undertaken.

5.1.3 Annex 2 of the Retail Planning Guidelines 2012 sets out the matters that should be taken into account when determining the vitality and viability of City and town centres. A health check assessment essentially analyses the strengths and weaknesses of city/town centres and is based on a qualitative analysis of factors such as the range and quality of activities in the centre, its mix of uses, its accessibility to people living in the area and its general amenity appearance and safety.

5.1.4 The Retail Planning Guidelines 2012 provide a comprehensive checklist of information to be included in a health check assessment. It is stated in the guidelines that a healthy town centre, which is vital and viable, balances a number of qualities including:

Attractions: These underpin a town and comprise the range and diversity of shopping and other activities which draw in customers and visitors.

Accessibility: Successful centres need to be both accessible to the surrounding catchment area via a good road network and public transport facilities, and to encompass good local linkages between car parks, public transport stops and the various attractions within the centre.

Amenity: A healthy town centre should be a pleasant place to be in. It should be attractive in terms of environmental quality and urban design, it should be safe and have a distinctive identity and image.

Action: To function effectively as a viable commercial centre, things need to happen. Development and improvement projects should be implemented efficiently; there should be regular and effective cleaning and maintenance and there should be co-ordinated town centre management initiatives to promote the continued improvement of the centre.

5.1.5 In addition to the above factors the Guidelines also recommend a number of other indicators that can be used to determine the vitality and viability of existing town centres. However, some of the information set out in the guidelines is not available for centres outside of the main cities and towns, for example- shopping rents, pedestrian flows and pattern of movement in retail rents within primary shopping areas. Where this data is available for centres, it is commented upon in the analysis.

5.1.6 In order to determine the vitality and viability of existing city and town centres in the Metropolitan Area the following indicators were utilised.

- Attractions
- Accessibility
- Environmental Quality/Amenity
- Diversity of Uses
- Multiple Representation
- Levels of Vacancy

5.1.7 Factors such as the extent of recent development and the suitability of existing floorspace were also considered. In addition the health check analysis also includes a clear definition of the core retail area. Maps indicating the extent of the core retail area in each centre are contained in Appendix 2 of this report.

5.1.8 In relation to vacancy, the report includes a map of the vacant units in the core retail area within each town centre. The core area vacancy maps are contained in Appendix 3 of this report. The overall approximate vacant floor area in each centre is expressed. Vacancy rate is expressed as a percentage of the total retail floorspace within a town centre. A vacant unit was considered to be any property that had a ground floor retail or commercial unit which was available or suitable for future retail use. In some instances the number of vacant units in the town core is also provided and is expressed as a percentage of the total number of retail units within the core area.

5.1.9 Diversity of use refers to the representation of different types of floorspace in a town centre. It is an important factor in considering the vitality and viability of a town/city as non retail uses such as cafes, restaurants, leisure attractions etc. can equally play an important role in contributing to the life and vibrancy of a centre. A successful town/city centre is a place where retail activity is combined with other attractions and things to do. The night time economy is also important in this regard. Equally however, certain land uses and activities can detract from the amenity and attractiveness of a town centre.

- 5.1.10 It should be noted that key actions and recommendations for each is set out in Section 8 of the report. Potential retail opportunity sites are identified in Appendix 4.
- 5.1.11 A detailed analysis of individual towns was also carried out by the PPU Cork County Council on 12 towns in the county in 2012. This study has informed the health checks for Carrigaline, Midleton, Cobh and Ballincollig.
- 5.1.12 This chapter presents a summary of the key findings of the health checks undertaken for each town. The complete health checks for each centre are contained in Appendix 5.

5.2 Cork City Centre

Introduction

- 5.2.1 Cork City is the second largest urban centre in the Republic and according to the census 2011 has a population of 119,203 persons. The City has been designated as a gateway in the National Spatial Strategy.

Core Retail Area

- 5.2.3 The Core retail area is indicated in Appendix 2. It 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 here. It is noted that there is a contrast between the eastern and western ends of St. Patrick's Street with its western end having a greater representation of independent retailers. Oliver Plunkett Street provides a more localised retail function and has a high representation of independent and indigenous retail operators. With the exception of Opera Lane, the side streets are generally characterised by smaller independent retailers, cafes, bars and restaurants. These nonetheless contribute significantly to the vitality of the City and in particular the night time economy. Opera Lane accommodates a number of significant international retail anchors.
- 5.2.4 Retail activity is also present on Grand Parade Street and on North Main Street. There is a small retail mall anchored by Dunnes Stores located here. There is some limited retail representation on Washington Street. To the north of the River, McCurtain Street also has a retail and service role, although commercial activity on this street is generally more characterised by retail services and food and beverage outlets. Shandon Street, also to the north also plays an important localised retail and service role.

Attractions

- 5.2.5 Cork City Centre accommodates a diverse range of uses which enhances its role as the commercial centre of the County and broader region. These include a wide variety of shops,

pubs, restaurants and cafes along St. Patrick's Street, Oliver Plunkett Street and the streets in their environs. The City Centre accommodates a range of cultural and entertainment activities with a wide variety of theatres, cinemas and art galleries which enhance the overall vitality of the area.

- 5.2.6 The City Centre performs a regional role and contains a higher order of retail representation than other centres in County and indeed region. A wide range of international retailers and specialist stores help to increase the range of goods and retail offer. A unique feature of the City is also the high representation of independent and local retail operators who are in particular represented on Oliver Plunkett Street. This adds to the uniqueness and character of the City.

Environmental Quality/Amenity

- 5.2.7 Cork City has an attractive and distinctive streetscape. It has retained much of its original form along its principal streets and is attractive to the pedestrian in both scale and use with a series of high quality public spaces. St. Patrick's Street in particular which is the main retail thoroughfare has a number of buildings of significant architectural merit. Oliver Plunkett Street and the adjoining areas have largely retained their fine urban grain with many traditional shop fronts and fascias intact. This adds to the ambience and character of the streetscape.

- 5.2.8 Recent works by the City Council to improve the public realm in parts of the city centre have added greatly to the overall attractiveness of the main shopping area. These include significant improvements to the public realm including widening of pavements on St. Patrick's Street and the pedestrianisation of Oliver Plunkett Street (during core business hours) and adjacent streets. This has made the City a much more attractive place to shop.

- 5.2.9 Notwithstanding the high quality of the environment in the City Centre, it is noted that there are some signs of vacancy and obsolescence, particularly on the secondary retail streets. There has also been a loss of some independent retailers which erodes the character and diversity of the City. Vacancy in non retail streets such as South Mall is also evident. In this regard the City will need to continue to invest in the public realm and proactively address the issue of vacancy to ensure that the City continues to compete effectively.

Accessibility

- 5.2.10 The City Centre is highly accessible by a range of public transport modes. Cork's Kent Station is the main train station in the city. The main line train from Cork to Dublin has hourly departures and a number of connecting services. Public bus services within the city are provided by the national bus operator Bus Éireann. A wide range of parking facilities are provided within the City Centre On street disc parking is also available throughout the City. A park by text system is in operation

Diversity of Uses/Multiple Representation

5.2.11 Cork City Centre has a diverse range of retail, service, entertainment and recreational functions within the City Centre. This creates a diverse and vibrant retail environment. On St. Patrick's Street, there are a number of significant department stores including Debenhams and Brown Thomas as well as the independent Modern Department Store. There are a wide range of national and international multiples represented including Marks and Spencers, Laura Ashley, Easons, Schuh, Awear, Ecco, Penneys, Clarkes, Evans, Monsoon, French Connection etc. The new development at Opera Lane has allowed the development of a number of flagship retail stores that typically require larger floorplates including Tommy Hilfiger, The Gap, Next, River Island, New Look and H & M.

Levels of Vacancy

5.2.12 The floorspace study reveals that there is 33,754 sq. metres of vacant floorspace in the City. This represents 23.2% of the total retail floorspace in the City. Much of this is however, located in secondary retail areas. Vacancy levels within the prime retail area are generally low.

Rental Levels

5.2.13 The October 2012 IPD Market Bulletin identifies that Cork City rental levels have contracted by 2.5% and Limerick by 3.5% during the first half of 2012. Rents in Cork and Limerick City are noted as being down 52% from the peak and as a result Cork and Limerick offer good value for prospective tenants.

Conclusion

5.2.14 Cork City Centre has an attractive cityscape which is being significantly enhanced by the ongoing public realm improvements. The principle shopping streets have a pleasant shopping environment with good shop front presentation, attractive paving and high quality public realm. The City Centre is compact and pedestrian friendly and car parking is well provided for.

5.2.15 There has been significant investment in the City Centre in recent years with new developments such as Opera Lane and Cornmarket significantly adding to the retail attraction of the City Centre. The City Centre has a broad range of international, national multiples as well as a strong representation by the indigenous sector. The English Market is a unique attraction. This mix of retailing gives Cork a distinctive character. The role of the indigenous retail sector should be encouraged as this plays a significant role in the character and diversity of the City. Retail provision is complemented by a broad range of retail service, cafes and restaurants, which also contribute to the night time economy. It is envisaged that the cultural and entertainment profile of the City will be further enhanced with the development of the Beamish and Crawford site.

5.2.16 Whilst undoubtedly there have been a number of successes in the City in recent years, particularly in terms of the urban realm and retail attractions, there is a need to continue to enhance and reinforce the function of the retail core. Signs of some erosion of retail activity and obsolescence are evident on Grand Parade and the western end of St. Patrick's Street. Some vacancy was also noted on the more peripheral side streets such as Frenchchurch Street

and Academy Street, whilst streets such as Washington Street and Mc Curtain Street are struggling to retain a retail function. There has been a loss of a number of indigenous local retailers and such a trend could continue to erode the character and diversity of the City centre. These issues are matters that will need to be addressed in order to stem the further decline of the City centre. There are also a number of large undeveloped and underutilised sites within the city area that have the potential to contribute in a significant way to the strengthening of the retail core.

5.2.17 In terms of public realm improvements, these have significantly enhanced the ambience of the City. These works need to be maintained and continued to be rolled out to the more peripheral areas of the retail core including North Main Street. The continued upgrade and enhancement of the public realm will be an important factor in ensuring that the City retains its competitive edge particularly when faced with increasing competition from the outlying district centres, most notably Mahon.

5.2.18 Whilst the accessibility of the City is generally good, there is scope for improvements to directional signage in the city centre and for improvements to signage regarding parking locations and space availability. Cycling facilities in the City could be improved with the provision of further dedicated parking and cycle paths. The development of a Cork Bike scheme would be very beneficial. It is noted that the City is currently preparing a City Centre Movement Strategy which will address some of these issues and identify measures to improve and enhance non car access to the City centre. The City would benefit from further pedestrianisation, particularly of St. Patrick's Street. There will also be a need to continue to positively promote the City to tourist and retail businesses. Further specific measures to improve the retail offer and competitiveness of the City Centre are addressed in section 8 of this report.

5.3 Cork Suburban District Centres

Mahon Point District Centre

5.3.1 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. Whilst designated a district 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.

5.3.2 Mahon is the largest district centre in Cork with 16,808 sq. m. net sales of comparison floorspace. Mahon also accommodates just under 3,000 sq. m. net sales of convenience retail floorspace. The adjacent Mahon Point Retail Park contains 13,384 sq. m. of retail warehousing floorspace.

5.3.3 Mahon Point Shopping Centre offers a wide range of shops and includes cafes, fast food outlets and restaurants and a multi-screen cinema with good road access via the N40 to

much of the metropolitan area. The accessibility, type and range of offer at Mahon Point result in a high pedestrian footfall both during the day and evening. A farmers market is also held in the car park of the centre every Thursday. The centre accommodates a range of national, international and independent retailers.

- 5.3.4 Although the strong comparison retail offer results in a busy and vibrant centre during the day there is a limited range of evening uses and absence of residential use in the Mahon Point area, which is dominated by commercial uses. The centre has a limited provision of retail and community services, particularly those that would serve local needs. The centre primarily acts as a comparison retail destination rather than acting as a local district centre to serve its local catchment.
- 5.3.5 Any future development proposals for Mahon Point Shopping Centre on the district centre zoned lands should seek to develop the area as a mixed use urban centre, with urban design and access improvements, particularly from the residential areas to the north. It will be important to also improve the range of retail services and community facilities on offer to ensure that the centre fulfils its role as a district centre serving the needs of its local catchment rather than acting primarily as a comparison shopping destination.

Blackpool District Centre

- 5.3.6 Blackpool is a designated District Centre serving the northern suburbs of Cork City. Blackpool District Centre is centrally located within Blackpool Valley, which traditionally has been the economic / industrial heart of the northside of the City and where significant commercial and retail development has taken place in recent years. 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.
- 5.3.7 The District Centre contains Blackpool Shopping Centre and a Retail Park. In addition there are a number of cafes, retail service uses, office, residential, a cinema and a library in Blackpool District Centre. There is good provision of surface and multi-level car parking. There are low levels of vacancy in the centre at present.
- 5.3.8 The shopping centre is anchored by Dunnes Stores. The Shopping Centre has a lack of national and international multiple retailers. A further weakness is the absence of a second anchor store. Notwithstanding this, the centre has a good range of local independent retailers which provide a good mix and offer to the local catchment. The centre is highly internalised with no significant streetscape interaction or animation. This weakness should be addressed in any further expansion. The retail park is anchored by Woodies DIY, with a good mix of modern convenience, comparison and bulky goods operators.
- 5.3.9 Any future expansion of the district centre, possibly including a second retail anchor in the shopping centre, should provide significant urban design improvements such as greater external activity and animation and much improved linkages and integration with the northern part of the district centre in particular for pedestrians. The redevelopment of the Sunbeam and Millfield Industrial Estate sites in the northern part of the district centre zoned lands also provides further opportunities for expansion of Blackpool District Centre.

- 5.3.10 Blackpool’s accessibility would be significantly enhanced through the opening of Kilbarry Rail Station. Proposals which result in improvements in the urban design and connectivity of the district centre lands with surrounding areas would be welcome in the ongoing regeneration of the area.

Wilton District Centre

- 5.3.11 Wilton is the designated District Centre for the south west suburbs of Cork City. It consists of Wilton Shopping Centre and a parade of shops, retail service and other commercial units on the Bishopstown Road / Cardinal Way.
- 5.3.12 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 southern part of the shopping centre, which includes a Tesco store and 10 retail units, was constructed in the past ten years.
- 5.3.13 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. Wilton District Centre is a busy shopping centre which trades well. However, it is of a poor quality urban design and would be complemented by a greater range of uses including a greater range of lower order comparison offer. There is a significant extant permission for the redevelopment of the northern part of the shopping centre. However, this permission is unlikely to be implemented.

Ballyvolane District Centre

- 5.3.14 Ballyvolane District Centre is located in the north east of Cork City at the junction of the Ballyvolane Road and the Ballyhooly Road and to the north of the R635 North Ring Road. The district centre consists of lands in the administrative areas of both Cork City Council and Cork County Council. The lands are located to the north of the Glen River Valley.
- 5.3.15 The District Centre zoned lands in Cork City Council’s area contain the Dunne’s Stores anchored shopping centre. The shopping centre is accessed from Ballyhooly Road and the Ballyvolane Road.
- 5.3.16 Planning permission for the extension of the shopping centre was granted in 2008. There is an additional area of ‘Town Centre / Neighbourhood Centre’ zoned land further to the south of the Fox & Hounds Neighbourhood Centre and to the north of the Glen River. No development has taken place on these lands to date. Any redevelopment or expansion on the District Centre lands located in the City Council administrative area, which currently contain the Dunne’s Stores anchored shopping centre, should provide significant urban design improvement to create animated external frontages, with a mix of uses and good quality urban design and public realm.
- 5.3.17 Any further expansion of retail floorspace on the ‘Town Centre / Neighbourhood Centre’ zoned lands in Cork County Council’s area will need to be carefully considered in terms of

the requirement for additional retail floorspace in the overall Ballyvolane District Centre, the suitability of the lands to accommodate retail floorspace and the urban design and public realm benefits they would deliver for the area.

- 5.3.18 Both planning authorities should consider mechanisms to deliver greater connectivity and legibility between the existing retail floorspace at Ballyvolane. Improvements to the pedestrian and cyclist network in the area should be facilitated. Upgrading of existing public transportation services and other green modes of infrastructure would be beneficial.

Douglas

- 5.3.19 Douglas performs well in terms of its role as a District Centre particularly in terms of convenience shopping. It is 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 has 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.
- 5.3.20 Douglas provides a good range of convenience retailing, such as Tesco Extra, Dunne's Stores and Marks and Spencer's, and also provides a range of national and independent comparison retailers. There is a wide range of retail services provided throughout the District Centre.
- 5.3.21 Douglas is easily accessible by car and is also accessible by public transport in the form of relatively frequent bus services. There is a good provision of car parking. However, the local road network can become congested at peak times. Pedestrian movement is generally well provided for. However, there is a disconnect between Douglas Court Shopping Centre and the traditional village area which acts to discourage pedestrian movement between these areas.
- 5.3.22 Whilst the Douglas Village Shopping Centre has improved the visual appearance of the area, and the traditional village centre area is attractive and well maintained, there are a number of areas which would benefit from redevelopment and / or refurbishment, most notably the area opposite the main entrance to Douglas Village Shopping Centre, currently comprising primarily of a dated cinema building and surface car parking. Douglas Court Shopping Centre is also dated in appearance, internally focused, and is dominated by surface car parking and would benefit from refurbishment, including improvements in terms of pedestrian connectivity and public realm improvements. St. Patrick's Woollen Mills could benefit from redevelopment including pedestrian and public realm improvements.

5.4 Cork City and County Suburban Neighbourhood Centres, Local Centres and Retail Warehouse Parks

5.4.1 There are thirteen designated neighbourhood centres in suburban Cork. Four are located in the northern suburbs and eight are located in the southern suburbs. The majority of neighbourhood centres consist of a group of shops and non-retail uses anchored by a convenience store. However, a number of neighbourhood centres consist of standalone supermarkets. The following provides a summary of the neighbourhood centres in suburban cork.

Northern Suburbs

Hollyhill

5.4.2 Hollyhill is a neighbourhood centre to the north of Cork City. The centre is located to the west of the Northside Campus learning centre and community campus. The centre provides principally day-to-day convenience and retail service needs and is anchored by a SuperValu store. It is anticipated over the lifetime of the study that Hollyhill has the potential to develop to a district centre in order to facilitate the regeneration of the area.

Mount Agnes Road

5.4.3 Mount Agnes Road neighbourhood centre is located to the north of Cork City. The centre is located to the south of an industrial estate. The centre consists of a Lidl Discount Foodstore only, with a net retail area of approximately 1,000 sq. m., which provides for the convenience retail needs of the surrounding area.

Blackpool Village

5.4.4 Blackpool Village is a large neighbourhood centre to the north of the city. This centre provides a range of goods and services for the local community, however, there are also a number of vacant sites and derelict buildings, particularly in the northern part of the centre, and the area as a whole would benefit from further urban regeneration and public realm improvements. The main convenience offer in the village is provided by Centra and a Polonez convenience store.

Mayfield

5.4.5 Mayfield neighbourhood centre is a purpose built parade of shops located in the north east suburbs of Cork City and is located at the junction of Old Youghal Road regional route and Mayfield Park / Silversprings Road regional route. Mayfield comprises a series of small retail and service units, including a Mace convenience store. A modern Aldi store, with a net retail area of approximately 1,074 sq. m. is located to the east of the more dated parade of shops.

Southern Suburbs

Avenue de Rennes

- 5.4.6 Avenue de Rennes neighbourhood centre is situated in the south east suburbs of Cork City along Avenue de Rennes, between the junctions of Ringmahon Road and Mahon Drive. This centre provides a broad mix of retail service units and includes two pubs, however, there is no convenience store present.

Blackrock Hall (Ballinure)

- 5.4.7 Blackrock Hall is a recently developed neighbourhood centre to the south east of Cork City. The centre is situated adjacent to Blackrock Avenue and to the south of Skehard Road. The centre is anchored by an Aldi Discount Foodstore with a net retail area of approximately 815 sq. m. The centre also contains a pharmacy, an opticians and a health food shop.

Skehard Road

- 5.4.8 Skehard Road neighbourhood centre is situated in the South East suburbs of the city to the south of the Skehard Road junction with Church Road. SuperValu is the anchor convenience store in this centre. There is also an off licence, a beauty salon and a pharmacy in the centre as well.

Tory Top Road/Curragh Road

- 5.4.9 This neighbourhood centre, located to the south of the City Centre, is situated at the junction of a number of roads and is located to the north and south of Tory Top Road and to the east of Curragh Road and Kinsale Road. The centre contains two convenience stores, a Mace and an Aldi Discount Foodstore.

The Lough

- 5.4.10 The Lough neighbourhood centre is located to the south of Cork City Centre on the Togher Road. The centre is within an extensive residential area. The Lough is made up of a number of small retail units and is anchored by a larger SuperValu store.

Togher / Clashduv Road

- 5.4.11 Togher is a neighbourhood centre to the south west of Cork City. The neighbourhood centre comprises of a standalone Lidl Discount Foodstore.

Bishopstown (Curraheen Road)

- 5.4.12 Bishopstown is a neighbourhood centre to the south west of Cork City Centre and is located approximately 1km from Wilton District Centre. The retail floorspace in Bishopstown neighbourhood centre is focused on a Dunnes Stores anchored parade of shops to the north of Curraheen Road. It has a dated appearance and is in need of reinvestment. The smaller shop units are closed and the Dunnes Stores has been consolidated into a smaller unit comprising of convenience floorspace only.

Bishopstown Court

5.4.13 Situated less than one kilometre from Bishopstown Neighbourhood Centre and Wilton District Centre, on the southern side of the Bandon Road Roundabout, is Bishopstown Court Shopping Centre. This is a more modern, free-standing Dunnes Stores containing convenience and comparison floorspace.

5.4.14 Cork County Council granted permission for an extension of duration on a previous planning application to extend to the eastern side of the shopping centre for non food retail use, to include sale and consumption of alcohol off the premises. This permission has not been implemented to date.

Cork Suburban Local Centres

5.4.15 At the lowest level of the retail hierarchy in Cork City are a number of local centres located across the north and south suburbs. In total there are 16 designated local centres in the Cork City Development Plan 2009-2012. These centres mainly comprise of a small parade of shops containing a convenience unit and a number of retail service outlets which serve the day to day needs of a localised catchment area.

Cork County Neighbourhood Centres / Village Centres

Little Island

5.4.16 East Gate Village is a neighbourhood centre serving Little Island. This centre is situated in a light industrial / commercial area and adjacent to Eastgate Retail Park. A relatively small amount of retail floorspace is provided in Eastgate Village. There is 162 sq. m. of comparison goods and 396 sq. m. of convenience floorspace, which includes a Spar store.

Tower

5.4.17 Tower is located approximately 11 kilometres north west of Cork City and approximately 3 kilometres to the west of Blarney. In terms of retailing, Tower accommodates a purpose built retail centre comprising of a large Centra store, a pharmacy, a florist, a beauty clinic and a number of office units.

Grange Road

5.4.18 This centre is situated to the north of Grange Road and comprises a significant element of convenience floorspace, supported by a good mix of retail service and commercial uses. There is significant surface car parking also located in this centre which is surrounded by substantial residential neighbourhoods. The centre contains an Aldi discount foodstore and a SuperValu convenience store.

Cork Suburban Retail Warehouse Parks & Floorspace

5.4.19 There are only two purpose built retail parks of significant scale in the metropolitan area at Eastgate and Mahon. There are a number of other locations with smaller scale purpose built retail warehouse floorspace and other locations with ad hoc retail warehouse floorspace.

Eastgate Retail Park

5.4.20 Eastgate Retail Park is located in a large industrial area. The retail park is situated off the N25 national primary road and the R625 regional road, 1 kilometre east of the Jack Lynch Tunnel.

5.4.21 There are 11 no. units in this retail park comprising of 16,533 sq. m. of retail warehouse floorspace. However, only 5,115 sq. metres is occupied. The existing tenants include Harvey Norman, Cost Plus Sofas. There is also a Costa Coffee and KFC in the retail park. There are five vacant units, including the anchor units, in the retail park at present.

Mahon Point Retail Park

5.4.22 Mahon Point Retail Park is located to the west of Mahon Point Shopping Centre and is accessed from the R852 regional route, which provides direct access to the N40 South Ring Road to the south of the retail park. Mahon Point Retail Park contains ten retail warehouse units and provides for mainly bulky goods retailing and contains 13,384 sq. m. (net) floorspace. The retail park is anchored by B&Q and also contains Homestore and More, Argos and Home Focus.

Blackpool Retail Park

5.4.23 Blackpool Retail Park is located to the north of Cork City centre and is situated within the northern part of the Blackpool District Centre zoned lands. The retail park functions as part of the district centre and is not restricted to bulky goods floorspace. The units in the retail park provide for a mix of bulky goods, comparison goods and convenience goods floorspace, which is reflective of the district centre designation of the area. The retail park is anchored by Woodies DIY store, and also contains Argos, Aldi, Maplin's, Boots and Lifestyle Sports. The Carpet Right unit is currently vacant.

Kinsale Road

5.4.24 There is a small purpose built retail warehouse park to the east of the Kinsale Road which contains two no. units, Woodies DIY and Harry Corry. This development has a total gross floor area of approximately 5,091 sq. m. and is of a good quality design.

5.4.25 In addition to the above there is a broad range of medium sized retail warehouses units located within the industrial areas on the Kinsale Road and the Tramore Road.

5.4.26 The retail warehousing uses at Kinsale Road are located in existing industrial estates concentrated around the Kinsale Road, the N27 South City Link Road and to the north of the N40 South Ring Road. There are also a number of retail warehouse units located in industrial units along the Tramore Road.

Other Locations

5.4.27 There are also a number of other locations in the suburbs where ad hoc retail warehousing units exist. This includes the following locations in the north suburbs: Northpoint Business Park, Boland's Industrial Estate, Fitz's Boreen, Ballyvolane, Hollyhill Industrial Estate, Hollymount Industrial Estate and Mayfield Industrial Estate; and the following locations in the south suburbs: Doughcloyne Industrial Estate, Sarsfield Road, South Cork Industrial Estate, Pouladuff Road, Southside Industrial Estate and Togher Industrial Estate.

5.4.28 A number of these locations include an ad hoc and excessive level of signage and poor quality urban environments with a lack of landscape treatment, in particular the Tramore Road and Kinsale Road area.

5.5 Midleton

5.5.1 Midleton is a satellite town of Cork City, located in the south east of the county. The town is approximately 23 km east of Cork City Centre.

5.5.2 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, in recent years, 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.

5.5.3 Midleton is the principal market town of East Cork and has a strong retail and commercial base. The town also retains a strong manufacturing and services sector Tourism is an important contributor to the economy of Midleton, with the Old Distillery acting as a major attraction.

5.5.4 Midleton accommodates a diverse range of retail and non- retail uses in line with its role as a Market town serving east Cork. These include a wide variety of pubs, restaurants and cafes along Main Street which complement the retail and tourism roles of the town. There are also a large number and variety of independent boutiques, financial institutions and service providers. Midleton town centre is considered vibrant, with a range of independent, national and international operators. The town has a good mix of retail and service facilities in line with its role as a market town serving east Cork. A notable feature in the retail offer of the town is the number of independent retailers, particularly in the comparison sector.

5.5.5 The public realm and physical environment of the laneways radiating from Main Street would benefit from a continuation of improvement works and further investment. In addition the traditional town centre would benefit from better and more integrated pedestrian linkages and pedestrian crossing facilities would enhance the character and accessibility of the town centre.

5.6 Cobh

- 5.6.1 Cobh is an attractive coastal town with a strong maritime tradition that is reflected in its fine streetscape and architectural heritage. Its unique topography, grandiose architecture and unusual streetscape give the town a distinctive character. It has however a somewhat run down appearance due to poor maintenance, the loss of sash windows, clustering of inappropriate non retail uses and high vacancy levels. The town has a number of significant tourist attractions and has benefited from significant environmental improvements in recent years.
- 5.6.2 Notwithstanding this, the town has poor retail representation with a notable lack of clothing and footwear shops (particularly for ladies and children). There is no large convenience store in the town centre. Whilst there are some attractive small specialist retailers there was generally a limited provision of cafes, delis and craft shops. Vacancy levels in the town centre were notable which detract from the ambience and character of Cobh. It was also noted that there has been a proliferation of non-retail uses in the town centre including fast food takeaways, bookmakers and a casino. The retail character of the town is generally low grade with little diversity, character or attraction.
- 5.6.3 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 be harvested to its full potential. Clearer signage and way marking would be beneficial to encourage greater movement and circulation of tourist around the town. The development of further events and festivals as well as co-ordinated marketing initiatives and a clear branding image for the town will also be important to secure Cobh's role and function as a tourist destination. Investment and continuing upgrade to the public realm will be important and such works should respect the Victorian character of the town. The council should encourage the reinstatement of traditional sash windows in the important seafront terraces.
- 5.6.4 It is important that the retail primacy of the town centre is restored and retail development, and comparison in particular, outside of the town centre needs to be carefully controlled. Given its isolation for the town centre, additional expansion of the retail base at Ticknock is not desirable as it could undermine the town centre. If further convenience retail is to be provided then it would be preferable to have it within the town centre which would be capable of accommodating smaller 'express' type stores or by developing other sites closer to the main residential areas. There are opportunities available within the environs of the town, in areas such as Newtown for example, to redevelop and expand existing shopping facilities and to provide a more modern style supermarket serving a local residential catchment.
- 5.6.5 It is acknowledged that the accommodation of larger store formats is more challenging within the historic core of the town. However, creative solutions should be considered in order to facilitate the amalgamation/redevelopment of units and infill schemes to accommodate some modern retail developments within the core of the town. There is ample opportunity within the town core for niche and specialist retail provision and the historic fabric of Cobh can provide an attractive setting for such retailers.

5.6.6 In terms of retail warehousing it is important that only bulky goods are retailed at Ticknock and that development complies with the minimum/maximum requirements for retail warehousing in order to protect the primacy of the town centre for comparison shopping.

5.7 Ballincollig

5.7.1 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. The popularity of neighbourhood centres, for example SuperValu at West Village Shopping Centre and Lidl at Westpoint Business Park is counter-acted by a good range of convenience outlets in the town centre (SuperValu, Dunne's Stores and two Aldi stores, as well as independent retailers).

5.7.2 There is a good range of convenience retail provision and there is a significant representation of independent comparison outlets. There is a high vacancy rate in the new town centre scheme on the former Barrack site with a number of newly developed pedestrianised streets comprising of primarily vacant retail units.

5.7.3 The town core area has a positive overall appearance owing in particular to the public realm improvements associated with new developments to the north of Main Street. Pedestrian movement in the core area is good and is assisted by traffic calming measures in the town centre. There is generous free car parking available in the town centre.

5.7.4 The town presents a positive experience generally with ample space for pedestrians to move freely around the town centre with wide footpaths, good urban spaces and good linkages to key parking areas, etc. The core area of the town centre has benefited significantly in visual terms from its recent regeneration.

5.7.5 The area south of Main Street would benefit from investment and other public realm improvements, in particular Times Square Shopping District.

5.8 Carrigaline

5.8.1 Carrigaline is located approximately 14 kilometres south of Cork City. The core retail area of Carrigaline is concentrated around Main Street and the SuperValu anchored Carrigaline Shopping Centre on Cork Road. Carrigaline has a distinctive identity as a Metropolitan Town with a strong village character and unique natural setting. Carrigaline town centre is compact in form with retail activity concentrated along Main Street. The town retains a village character notwithstanding its expansion since the 1970's.

5.8.2 Carrigaline performs an important 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. The town centre would benefit from a more diverse range of comparison floorspace.

5.8.3 Main Street acts as the focus for retail activity within Carrigaline. A number of public realm improvements within Main Street would enhance the overall amenity of the town. Significant improvements could be made to Main Street in order to enhance the pedestrian experience. These include upgrades to footpath and enhanced pedestrian facilities, enhanced landscaping along Main Street, the undergrounding of overhead wiring and regulation of shop front signage. More appropriate boundary treatment to the SuperValu car park would be a considerable improvement. The town includes a number of vacant premises and sites which would benefit from regeneration.

5.9 Blarney

5.9.1 Blarney is a picturesque town which 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.

5.9.2 Blarney has a relatively modest residential population and the town provides a range of services to support the catchment population. Notwithstanding this, there is only one convenience outlet of note in the town, the SuperValu in the traditional town centre.

5.9.3 There is a good quality public realm in the town, aided by the traditional appearance of the town and the town square, together with good quality seating, lighting and paving throughout the town. The town is compact and pedestrian friendly. However, there can be traffic congestion at times, as a result of limited car parking in the town centre.

5.9.4 There is somewhat of a disjoint between the two retail areas in the town, namely the traditional core retail area and the secondary retail area at Sunberry Heights / St. Ann's Road.

5.10 Carrigtwohill

5.10.1 Carrigtwohill is designated as a Metropolitan Town within the CASP. 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 provided by "symbol" stores which provide for the day to day needs of the catchment population. The town would benefit from the provision of additional retail floorspace which has been permitted in recent years within the town.

5.10.2 The core retail area of Carrigtwohill is centred on Main Street which maintains a village like structure. Main Street is dominated by vehicular traffic and the presence of parallel parking at both sides of the street inhibits pedestrian movements throughout the town. The health check assessment has identified the need for additional off street car parking facilities and public realm improvements which would enhance the overall amenity of the town. The amenity of the town would furthermore be enhanced through the development of a number of key sites which are identified in Appendix 4 of this retail assessment.

5.11 Glanmire

- 5.11.1 Glanmire is located to the north-east of Cork City, approximately 7 kilometres from Cork City Centre, to the west of the M8. Glanmire is separated from the city suburbs by a short stretch of green belt.
- 5.11.2 The Hazelwood development at Riverstown near Glanmire 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. Other local centres in Glanmire, one at Old Court near Sarsfields GAA Club and a second on the R639 near Glanmire Business Park provide a small number of retail service uses.
- 5.11.3 Generally the Hazelwood development is functional in nature, and lacks any particular appeal in terms of visual amenity or public realm. The area in general would benefit from redevelopment and / or investment in the public realm.
- 5.11.4 Notwithstanding the above, vacancy rates are generally low which provides an indication of the good health of the centre in retail terms and points to the demand for retail provision at this location.

5.12 Passage West

- 5.12.1 Passage West is evidently a settlement that has experienced decline due to the demise of traditional industries and the dockyards. It nonetheless remains a strategically located settlement within close proximity to the City and with an attractive setting adjacent to the coast. There are significant opportunities for redevelopment in the town centre which would help regenerate the core retail area which has suffered significant neglect. There are a number of buildings of architectural merit in the town centre that would benefit from re-use and upgrade.
- 5.12.2 There is a notable lack of a large convenience store in the town centre and such a use would attract greater footfall to the town centre area and have positive spin off benefits. It would also benefit those who do not have a car to access the more peripheral Eurospar development. The development of such a facility would also attract customer from other nearby settlements such as Monkstown which also have no notable convenience offer.
- 5.12.3 The town centre would also benefit from further environmental works including hard and soft landscaping particularly on Main Street. Future development should be encouraged to exploit the coastal location and provide greater linkages and connections to the waterfront areas. The architectural heritage of the town should be respected and fostered in any future development proposals.
- 5.12.4 It is envisaged that Passage West will retain a primarily service role for its hinterland and in this regard future retail development and expansion should be commensurate with the size of the settlement and its planned growth.

CHAPTER 6: QUANTITATIVE ASSESSMENT

6.1 Introduction

6.1.1 This section provides an assessment of the likely capacity in quantitative terms for additional retail floorspace in the Metropolitan Area up to 2022. In the study, we cover the period from 2011- 2022 which enables a longer term look at retail planning and potential in the catchment area which is consistent with the Regional Planning Guidelines for the South West Region.

6.1.2 Drawing upon the quantitative analysis of expenditure patterns and future growth projections, this study provides indicative guidance on the scope and need for new retail floorspace and how it should be allocated within the retail hierarchy, having regard to the retail role and function of each centre.

6.1.3 It should be noted that all figures within this assessment are rounded off to the nearest point of decimal. The base year and price year throughout is 2011.

The Approach

6.1.4 The approach taken is a step by step capacity assessment including the following steps:

- Estimate the population at base and design year;
- Estimate of expenditure per capita on convenience, comparison and bulky household goods at the base year and the design year;
- Incorporate projections on inflows and outflows of expenditure to the catchment area based on the results of the shopper's and household surveys undertaken by Demographics Ireland;
- Estimate of total available expenditure in the base year and design year for residents within the Metropolitan Area;
- Estimate the likely increase in expenditure available for provision of additional floorspace;
- Estimate the likely average turnover of new floorspace in convenience and comparison goods;
- Estimate the capacity for additional floorspace in the Metropolitan Area;

6.2 Definition of Study Area

6.2.1 The study area identified for the purposes of this assessment is consistent with that identified in Chapter 4 of the Retail Study namely:

- Cork City Council Area
- Metropolitan Area excluding Cork City Council Area.
- Remainder of County Cork including the Metropolitan commuting area, north and west Cork.
- Catchment Area outside of County Cork including Kerry, Limerick, Tipperary and Waterford.

6.2.2 The study area for the purposes of this assessment is identified in Figure 6.1 prepared by Demographics Ireland.

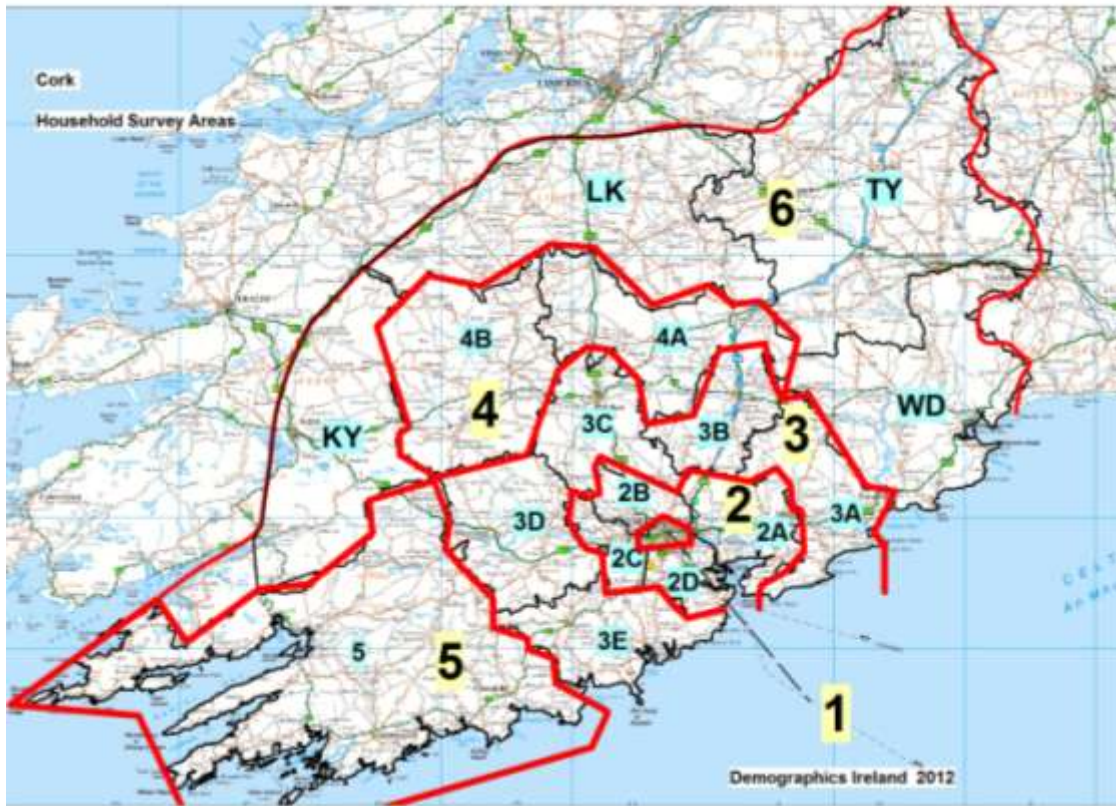


Fig. 6.1: Study Area

6.3 Population of Study Area

6.3.1 The population of the study area is obtained from the 2011 Census. The 2011 Census identifies a population of 119,230 for the City Centre and 170,509 for the remainder of the Metropolitan Area. The remainder of County Cork outside of the Metropolitan Area had a population of 229,293 in 2011 and the area of the catchment outside of the County had a population of 210,238.

6.3.2 Table 6.1 below shows the population of the Metropolitan Area, remainder of County Cork and remainder of catchment area in 2011 and 2022. The population projections for 2022 for Cork Metropolitan Area and remainder of Cork are obtained from those set out within the City and County Council’s core strategy document and are in accordance with the projections set out within the Regional Planning Guidelines for the South East Region.

6.3.3 The population growth rates assumed for the areas outside of Cork County and Metropolitan area are based on a conservative growth rate of 1% per annum.

Table 6.1: Population of the Study Area 2011 and 2022

Year	Metropolitan Area	Remainder of Cork County	Catchment area Outside Cork	Total Population
2011	289,739	229,293	210,238	729,270
2022	363,891	256,731	234,556	855,178

Source: 2011 Census, Population projections in accordance with Cork County and City Core Strategy

6.4 Expenditure Per Capita

6.4.1 Expenditure per capita is calculated based on the information contained within the Annual Services Inquiry (ASI) published by the Central Statistics Office. The most recent Annual Services Inquiry is the 2010 ASI which was published in 2012. The ASI is listed as the preferred source for expenditure per capita listed in the 1999 Roger Tym and Partners and Jonathan Blackwell and Associates report on the Retail Planning Guidelines and is consistent with the source used within the 2008 Cork Strategic Retail Study. This source is therefore used for the purposes of this capacity assessment.

6.4.2 The CSO have provided specific data for the study on the most appropriate categories for estimating expenditure per capita. 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)

6.4.3 Category 479 “retail sales not in stores, stalls and markets” is omitted from this assessment as this category includes mail order and internet sales. In accordance with the guidance set out within the Roger Tym and Partners / Jonathan Blackwell & Associates background study on the Retail Planning Guidelines, Categories 1 and 2 are classified as convenience goods expenditure. Categories 3-7 are classified as comparison expenditure for the purposes of this study. However, there is the exception of department stores which are classified under Category 1. The CSO have provided further specific information on the breakdown of the retail sales in the non – specialised stores category and from this breakdown it is apparent that sales in department stores account for approximately 7.3% of the amalgam of the convenience and department store category in 2010. The turnover attributed to expenditure in department stores is classified as comparison expenditure for the purposes of this study.

6.4.4 Based on the above assumptions we have estimated that the total expenditure nationally per capita in 2010 on convenience goods was €3,779 and €3,550 on comparison goods.

6.4.5 These expenditure figures are adjusted to a 2011 price year in line with the Consumer Price Index as set out in Table 6.2 below.

Table 6.2: Expenditure per capita

	Convenience	Comparison
2010 Prices	€3,779	€3,550
2010 CPI	101.2	101.2
2011 CPI	103.8	103.8
Calculation	€3,779/101.2*103.8	€3,550/101.2*103.8
2011 Prices	€3,876	€3,641

Source: 2012 (published) Annual Services Inquiry CSO. Consumer Price

- 6.4.6 The figures set out within Table 6.2 above illustrate convenience and comparison expenditure per capita prices in 2010 adjusted to a 2011 price year. No growth in convenience expenditure per capita has been assumed from 2010 to 2011 having regard to the recent economic downturn.
- 6.4.7 For convenience goods we have assumed no growth per annum between 2010 and 2013. A growth rate of 1% per annum is assumed between 2013 and the design year 2022. This is based on the assessment of growth rates set out in the Retail Sales Index (CSO) and adjusted to allow for population increases.
- 6.4.8 Expenditure growth on comparison goods has been substantially higher than expenditure growth on convenience goods over time. This is because most household's requirements in respect of convenience products have been largely satisfied and most additional expenditure has gone into products such as clothing, footwear, household goods, electrical goods, carpets, furniture and so on. Exceptionally high levels of growth in comparison goods sales were experienced in the late 1990's up to 2007.
- 6.4.9 However, as a result of the recent economic downturn, expenditure per capita has declined in the period 2008 to 2010 and is likely to grow slowly in the next few years in accordance with economic forecasts. We have therefore used a more conservative long term average for projecting forward and we have assumed no growth in expenditure between 2010 and 2013 and a conservative growth rate of 2% per annum between 2013 and 2016, increasing to 3% per annum between 2016 and 2022.

Table 6.3: Projected Expenditure per Capita		
Year	Convenience	Comparison
2011	€3,876	€3,641
2013	€3,876	€3,641
2019	€4,114	€4,222
2022	€4,239	€4,614

Source: Table 6.2. Assumptions from Annual Services Inquiry: No growth in convenience or comparison expenditure between 2011-2013. 1% growth per annum assumed for convenience between

- 6.4.10 The total available expenditure is set out in Tables 6.4 and 6.5 below. This is calculated by multiplying the population by the expenditure per capita for each category for each year.

Table 6.4: Total Available Convenience Expenditure

	Metropolitan Area	Remainder of Cork County	Catchment Area Outside Cork	Total Population
2011 Population	289,739	229,293	210,238	729,270
Expenditure per Capita 2011	€3,876	€3,876	€3,876	€3,876
Total Available Expenditure 2011	€1,123,028,364	€888,739,668	€814,882,488	€2,826,650,520
2022 Population	363,891	256,731	234,556	855,178
Expenditure per capita 2022	€4,239	€4,239	€4,239	€4,239
Total Available Expenditure 2022	€1,542,579,114	€1,088,314,574	€994,311,496	€3,625,205,183

Table 6.5: Total Available Comparison Expenditure				
	Metropolitan Area	Remainder of Cork County	Catchment Area Outside Cork	Total Population
2011 Population	289,739	229,293	210,238	729,270
Expenditure per Capita 2011	€3,641	€3,641	€3,641	€3,641
Total Available Expenditure 2011	€1,054,939,699	€834,855,813	€765,476,558	€2,655,272,070
2022 Population	363,891	256,731	234,556	855,178
Expenditure per capita 2022	€4,614	€4,614	€4,614	€4,614
Total Available Expenditure	€1,678,865,316	€1,184,466,698	€1,082,158,489	€3,945,490,503

2022				
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6.4.11 Table 6.5 above sets out the total available comparison expenditure available within the Metropolitan Area. In considering the above expenditure levels, it is important to note that significantly different levels of turnover will apply to city/town centre comparison goods such as clothing and footwear and smaller household durables than would apply to bulky household goods sold in retail warehouses. The market share results obtained from the household telephone survey furthermore illustrate the difference between pure comparison goods and comparison expenditure in retail warehouses.

6.4.12 Retail warehouses have a distinct function and are generally located outside of the city/town centres. It is necessary to establish the expenditure potentially available to town centre comparison floorspace. In this regard, it is considered important to split between expenditure available for bulky household goods and comparison goods within the study area. Having regard to the Household Budget Survey, the Annual Services Inquiry and experience elsewhere in this respect, it is estimated that approximately 20% of comparison expenditure will be accounted for by bulky household goods in retail warehouse type premises.

6.4.13 Estimates for expenditure on bulky household goods and pure comparison floorspace are set out in Table 6.6 below.

Table 6.6: Total Available Expenditure split between Pure Comparison and Bulky Household Expenditure				
	Metropolitan Area	Remainder of Cork County	Catchment Area Outside Cork	Total Population
2011				
Pure Comparison	€843,951,759	€667,884,650	€612,381,246	€2,124,217,656
Bulky Household Expenditure	€210,987,940	€166,971,163	€153,095,312	€531,054,414
Total	€1,054,939,699	€834,855,813	€765,476,558	€2,655,272,070
2022				
Pure Comparison	€1,343,092,252	€947,573,359	€865,726,791	€3,156,392,402
Bulky Household Expenditure	€335,773,063	€236,893,340	€216,431,698	€789,098,101
Total	€1,678,865,316	€1,184,466,698	€1,082,158,489	€3,945,490,503

Adjustments to Total Available Expenditure

6.4.14 Some adjustments are also required to the capacity figures outlined in the tables above to take into account the levels of trade draw and leakage of expenditure from the catchment area. The results obtained from the household survey reflect current shopping patterns. Assumptions on both market share and trade draw are informed by the household and shoppers surveys undertaken by Demographics Ireland, the results of which are summarised in Chapter 4 of the Retail Study. The following trends are identified within the survey results:

Convenience

- The Metropolitan Area retains a market share of 99.2% for convenience shopping.
- The survey results identify a trade draw of 17.5% from the remainder of County Cork outside of the Metropolitan Area and 1.1% from the Counties outside of Cork within the catchment area.

Comparison

- The Metropolitan Area retains a market share of 98.4% for comparison shopping.
- A trade draw of 66.9% is experienced from the remainder of Cork outside of the Metropolitan Area and 13.4% from the remainder of the catchment area outside of County Cork.
- The shopper's survey undertaken by Demographics Ireland to inform the retail study identifies a 3% inflow to the City Centre from outside of the catchment area. In order to cater for this additional expenditure an inflow of 1.5% on comparison expenditure within the Metropolitan Area is assumed from outside of the catchment area.

Bulky Goods

- The Metropolitan Area retains a market share of 87.05% for bulky goods shopping.
- An inflow of 48.35% is observed from the remainder of County Cork and an inflow of 7.85% from the remainder of the catchment area outside of County Cork.

Internet Sales

6.4.15 The household survey undertaken to inform this retail study included specific questions on the internet sales within Cork. Only a small percentage of respondents noted that they carry out their main comparison 0.8% and bulky goods 0.2% shopping on line. An adjustment for existing levels of internet sales has already been made to the Annual Services Inquiry expenditure per capita figures in the omission of the category of "retail sales not in stores, stalls or markets". This category includes mail order and internet shopping data and accounts for approximately 1.4% of total turnover. While existing trends as evidenced from the household survey and the Annual Services Inquiry are low it is assumed that this format of retailing will grow over the lifetime of the retail study.

6.4.16 For the purposes of this assessment it is anticipated that internet sales will increase by 1%

for convenience, comparison and bulky goods expenditure within the catchment area by 2022. It should be noted however, that expenditure on internet retailing has the potential to significantly increase over the forthcoming years. As detailed in Chapter 3 it is an emerging trend and is likely to continue to become a more popular form of retailing as technologies improve and retailers embrace and promote this retail format. In this regard, it is recommended that expenditure data is regularly reviewed and adjusted over the life time of the study to account for any notable increase documented by the CSO or other verifiable source in terms of internet sales expenditure and that the implications for retail floorspace requirements are monitored. It is recognised that there may not be a direct link between increase in internet retailing and retailers floorspace requirements.

6.4.17 The trends identified within the survey results are estimated to continue throughout the lifetime of the retail study. The total available expenditure for convenience, comparison and bulky goods is set out in Table 6.7 below.

Table 6.7: Total Available Expenditure adjusted to account for Inflows and Outflows of Expenditure						
Period	Convenience		Comparison		Bulky Household Goods	
2011						
Metropolitan Area Resident Expenditure		€1,123,028,364		€843,951,759		€210,987,940
Less Outflow	0.8%	€8,984,227	1.6%	€13,503,228	12.95%	€27,322,938
Spend by residents in Metropolitan Area		€1,114,044,137		€830,448,531		€183,665,002
Add Imported Expenditure from Remainder of County Cork outside of Metropolitan Area	17.5%	€155,529,442	66.9%	€446,814,831	48.35%	€80,730,557
Add Imported Expenditure from remainder of catchment outside of County Cork	1.1%	€8,963,707	13.4%	€82,059,087	7.85%	€12,017,982
Add Imported Expenditure from outside of the catchment area			1.5%	€12,456,728		
Total Spend in Metropolitan Area		€1,278,537,28		€1,371,779,1		€276,413,541

		6		77		
2022						
Resident Expenditure		€1,542,579,114		€1,343,092,252		€335,773,063
Less Outflows	0.8%	€12,340,633	1.6%	€21,489,476	12.95%	€43,482,612
Spend by residents in Metropolitan Area		€1,530,238,481		€1,321,602,776		€292,290,451
Add Imported Expenditure from remainder of County outside of Metropolitan Area	17.5%	€190,455,050	66.9%	€633,926,577	48.35%	€114,537,930
Add Imported Expenditure from remainder of catchment outside of County Cork	1.1%	€10,937,426	13.4%	€116,007,390	7.85%	€16,989,888
Add Imported Expenditure from outside of the Catchment Area			1.5%	€19,824,042		
Minus on-line shopping	1%	€17,316,309.58	1%	€20,913,608	1%	€4,238,183
Total Spend in Metropolitan Area		€1,714,314,648		€2,070,447,177		€419,580,087

6.5 Existing Retail Floorspace in Catchment Area

6.5.1 The existing retail floorspace within the Metropolitan Area is based on the floorspace survey undertaken by Demographics Ireland to inform the retail study. The existing quantum of convenience, comparison and bulky floorspace within the study area is summarised in Table 6.8 below. The methodology for the calculation of this floorspace is set out within Chapter 4 of the Retail Study.

Source: Tables 6.4 and 6.5 and Demographics Ireland telephone survey

Location	Convenience	Comparison	Bulky Household
Cork City	16,201	88,407	6,860
Mahon District Centre & Retail Park	2,969	16,808	13,384
Blackpool DC & Retail Park	4,011	11,198	3,408

Wilton DC	4,022	7,272	0
Ballyvolane DC	4,001	2,011	924
Douglas DC ³⁰	12,435	12,255	2,431
Cork City Suburban Neighbourhood Centres	12,732	4,916	0
Cork City & Suburbs Retail Warehouse Floorspace	0	79	44,216
Cork City Local Centres	4,471	1,333	1,013
Residual Floorspace within Cork City Council Area	5,686	3,154	1,495
Passage West and Monkstown	1,399	145	0
Blarney	954	3,452	764
Glanmire	2,707	813	175
Carrigtwohill	1,962	1,678	5,029
Carrigaline	6,881	5,352	6,154
Midleton	8,529	9,423	7,407
Cobh	5,408	3,248	1,533
Ballincollig	9,728	11,445	2,784
Little Island	1,167	162	8,917
Other Rural Areas	3,729	824	3,783
Total	108,992	183,975	110,277

Source: 2012 Metropolitan Area Floorspace Survey

6.6 Turnover of Existing Floorspace

Existing Turnover Ratios

6.6.1 The total available expenditure figures for 2011 set out in Table 6.7 above are an estimate of the amount of expenditure that is currently being sustained by the estimated amount of floorspace in the Metropolitan Area. For example in 2012 the Metropolitan Area had 108,992 sq. m. convenience floorspace which is estimated to be generating a turnover of €1,278.5 million, 183,975 sq. m. of comparison floorspace which is estimated to be generating €1,371.7 million, and 110,277 sq. m. of bulky household floorspace which is estimated to be generating €276.4 million.

6.6.2 Looking at indicative turnover ratios (turnover divided by floorspace), trading conditions in

³⁰ It should be noted that the retail floorspace figures set out table 6.8 above in relation to Douglas are not comparable with those set out in the Douglas LUTS as the figures presented in table 6.8 above include only net comparison and convenience floorspace and relate to a different study area. Retail services are excluded from the figure.

the convenience sector would be considered to be trading at a healthy level (€11,730 per sq. m.) and possibly points to a small degree of overtrading having regard to the nature of convenience floorspace within the Metropolitan Area which comprises of a mix of modern retail floorspace and smaller symbol stores. Comparison floorspace is trading at an average of €7,456 per sq. m. and bulky goods floorspace is trading at €2,506 per sq. m. These ratios again point to overtrading.

6.6.3 These figures show the average turnover per square metre of existing floor space overall within the Metropolitan Area. They disguise significant differences in turnover for different shops. In general, multiple branches of national and international multiple shops are located within purpose built shopping centres or other prime locations. Prime town/city centre shop units will have substantially higher turnover per square metre than shops which are less well located or situated in older inefficient premises and are operated as independents. In particular, it is likely that smaller units have substantially lower turnover per square metre than these averages whilst the largest supermarket operators have substantially higher turnover rates per square metre.

Future Turnover Ratios

6.6.4 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 Metropolitan Area. While data available for the turnover of retailers in Ireland is limited, it is clear that existing comparison floorspace within the City Centre for example will yield a significantly higher turnover per sq. m. than existing lower order comparison floorspace provided within the smaller metropolitan towns. This is further evidenced by the results of the household survey which illustrate inflows of expenditure to the City Centre from the wider Metropolitan Area. Likewise smaller symbol stores also yield a significantly lower turnover per sq. m. than large supermarkets. For the purposes of this study a turnover of €11,000 per sq. m. is assumed for existing convenience floorspace within the County in 2011 and €7,000 per sq. m. for comparison floorspace. An average turnover of €2,500 per sq. m. is assumed for bulky goods in 2011 prices.

Table 6.9: Average Turnover Assumptions for Existing Retail Floorspace			
	Convenience	Comparison	Bulky Household
Assumed Turnover	€11,000	€7,000	€2,500

6.6.5 The turnover of existing retail floorspace within the Metropolitan Area in 2011 is obtained by multiplying the existing floorspace estimates set out in Table 6.8 by the turnover per sq. m. estimates set out in Table 6.9. The turnover of existing retail floorspace within the Metropolitan Area is summarised in Table 6.10 below.

Table 6.10: Turnover of Existing Retail Floorspace	
Convenience	€1,198,912,000

Comparison	€1,287,825,000
Bulky Household	€275,692,500

Source: Tables 6.8 and 6.9

6.6.6 The residual surplus for additional retail floorspace within the Metropolitan Area is obtained by subtracting the turnover of existing convenience, comparison and bulky goods expenditure from the total available expenditure as illustrated in Table 6.11 below.

Table 6.11: Expenditure available for new retail floorspace			
2011	Total Available Expenditure	Turnover of Existing Retail Floorspace	Residual Surplus
Convenience	€1,278,537,286	€1,198,912,000	€79,625,286
Comparison	€1,371,779,177	€1,287,825,000	€83,954,177
Bulky Household	€276,413,541	€275,692,500	€721,041
2022	Total Available Expenditure	Turnover of Existing Retail Floorspace	Residual Surplus
Convenience	€1,714,314,648	€1,198,912,000	€515,402,648
Comparison	€2,070,447,177	€1,287,825,000	€782,622,177
Bulky Household	€419,580,087	€275,692,500	€143,887,587

Source: Tables 6.7 and 6.10

6.7 Floorspace Capacity

6.7.1 In order to calculate the requirements for additional retail floorspace within the catchment area, the turnover per sq. m. of future retail floorspace should be divided by the available expenditure figures set out in Table 6.11. For the purposes of this assessment a turnover per sq. m. of €11,000 is assumed for future convenience floorspace, €7,000 for comparison retail floorspace and €2,500 for bulky goods floorspace in 2011 prices. No growth is applied to the turnover levels as they are considered to be trading at a high level.

6.7.2 Based on the application of these turnover assumptions the future floorspace requirements for additional convenience, comparison and bulky goods floorspace within the catchment is illustrated in Table 6.12 below.

Table 6.12: Indicative Floorspace Potential		
	2011	2022
Convenience	7,239	46,855
Comparison	11,993	111,803
Bulky Household	288	57,555

Source: Table 6.11, Assumptions: Assumed turnover ratios of €11,000 for convenience, €7,000 for comparison and €2,500 for bulky goods.

Pipeline Permissions

- 6.7.3 It is noteworthy that the figures set out in Table 6.12 above do not include for “pipeline” floorspace i.e. floorspace which has already been permitted in the Metropolitan Area but not constructed at the time of the preparation of the retail study. Such permissions exist throughout the settlements within the Metropolitan Area. The extent of this unimplemented floorspace is summarised in Table 6.13 below.

	Net sqm	Bulky Household	Comparison	Convenience
Cork City	26,528	1,630	24,410	488
Docklands	16,418	4,220	6,451	5,747
Northern Suburbs	572	0	-141	714
Southern Suburbs	3,128	0	1,170	1,958
Mahon	-197	0	-242	45
Blackpool	8,885	6,842	2,043	0
Wilton	10,609	0	8,296	2,313
Douglas	2,102	0	1,606	496
Ballyvollane	1,866	0	1,893	-27
Bishopstown	4,000	2,000	2,000	0
Ballincollig	3,322	0	1,479	1,843
Midleton	5,920	0	3,590	2,330
Carrigaline	1,170	0	0	1,170
Carrigtwohill and Fota Retail Park	18,127	10,474	1,105	6,548
Total	102,450	25,166	53,660	23,625

- 6.7.4 A number of these permitted schemes are significant and there is uncertainty regarding the timeframe for their delivery. Due to the current economic climate, retail conditions on a national basis and the considerable uncertainty as to which developments will be implemented and further uncertainty on timing, it is considered that the situation should be reviewed and assessed in considering future applications having regard to the situation at that time. Further guidance on this issue is provided in Chapter 7 when considering the future distribution of retail floorspace.
- 6.7.5 It is noted that if all of the pipeline floorspace permitted was implemented as permitted, a significant proportion of the floorspace requirements as set out in Table 6.12 would be met by these schemes.
- 6.7.6 In light of economic conditions a pragmatic approach should be taken to extant permissions recognising that any implementation of such permissions may be on a reduced scale from that originally approved, and / or on a phased basis. The nature and commercial viability of

pipeline floorspace should be considered when assessing applications for significant retail developments, having regard to the role and function of the respective centre.

- 6.7.7 A case by case consideration of the relevant pipeline floorspace will be necessary in considering any significant retail development having particular regard to the extent and location of extant permissions in that location. Key considerations in assessing future planning applications is the location and quantum of the proposed retail floorspace. The appropriate redevelopment and revitalisation of town/city centre lands will continue to be promoted as a priority.

Vacant Floorspace

- 6.7.8 Likewise the floorspace potential figures set out in Table 6.12 do not have regard to the extent of vacant floorspace currently existing throughout the Metropolitan Area³¹. Overall there is some 89,864 sq.m. of vacant floorspace identified within the Metropolitan area which is accommodated within 1,687 units. Vacant floorspace represents 22.2% of existing floorspace and 29.5% of existing units within the Metropolitan Area.

Table 6.14: Vacant Floorspace	
Location	Total Vacant Floorspace (sq. m. net)
Cork City Centre	
Cork City Centre	33,754
District Centres	
Ballyvolane	390
Blackpool	2,971
Wilton	1,005
Mahon	1,632
Douglas	6,010
Metropolitan Towns	
Ballincollig	11,765
Blarney	760
Carrigaline	1,988
Carrigtwohill	1,928
Cobh	4,031
Glanmire	1,325
Midleton	9,399
Passage West	810
Other	
Little Island	12,096
Total	89,864

³¹ These figures represent the extent of vacant floorspace within the entire urban area including the retail core

- 6.7.9 In considering the above vacancy figures it is important to have regard to the fact that not all vacant floorspace will be occupied by retail floorspace. Some of this floorspace will be occupied by retail service and other uses. Town centres by their nature include a wide mix of retail and non-retail uses and this point needs to be considered when assessing the vacancy figures set out within the retail study.
- 6.7.10 The extent of vacancy within town centres also significantly varies throughout the Metropolitan Area.
- 6.7.11 It is an objective of the Study to significantly reduce core retail area (including district centre) retail vacancy levels in the short term by 50% half of which (25%) should be occupied by retail uses and the remaining half occupied by non-retail uses including retail services. It should be noted that this is a minimum requirement and in certain locations a higher percentage may be targeted where particularly high vacancy rates prevail. It should be noted that these targets refer to the City Centre District Centres and Town Centres in the Metropolitan area.
- 6.7.12 Table 6.15 below sets out vacancy details for core retail areas within the individual retail centres within the Metropolitan area. The core retail areas are defined in Appendix 2³².

Table 6.15: Core Retail Area and District Centre Vacancy Levels						
Centre	Total No. of Units	No. of Vacant Units	% Vacancy	Total Floorspace sq.m.	Total Vacant Floorspace sq.m.	% Vacancy
Cork City Centre	556	133	24%	118,117	20,805	18%
Ballincollig	111	52	47%	31,619	6,113	19%
Blarney	7	2	29%	3,481	162	5%
Carrigaline	41	10	24%	10,023	986	10%
Carrigtwohill	17	6	35%	2,023	884	44%
Cobh	33	9	27%	2,593	608	23%
Douglas ³³	97	28	29%	24,054	4,820	20%
Glanmire	18	6	33%	3,476	663	19%
Midleton	103	23	22%	9,632	2,706	28%
Passage West	8	4	50%	636	434	68%
Ballyvolane	13	2	15.4%	6,936	390	6%
Blackpool	47	8	17%	18,617	2,971	16%
Wilton	55	9	16.4%	11,294	1,005	9%
Mahon	54	5	9.3%	33,161	1,632	16%

³² The core retail area refers to the prime retail area of an urban centre and is defined for Cork City and each town within the metropolitan area in Appendix 2.

³³ Note: Retail floor area for core area of Douglas differs to that of the Douglas LUTS as it excludes St. Patricks Mills. Also retail services are excluded from the floorspace figures.

Total	1,160	297	25.6%	275,663	44,181	16%
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6.7.13 Having regard to the above, it is considered that existing vacancy levels should be the key consideration within existing centres especially within modern purpose built retail developments. Where possible additional retail floorspace will be targeted within existing vacant floorspace. For large scale retail applications the onus will be on the applicant to demonstrate as part of the sequential test assessment that existing vacant units within the retail core are not suitable, viable and available to accommodate a development.

6.7.14 In order to address the objective of the Retail Study to reduce existing vacancy by 50% over the lifetime of the retail study, half of which (11,046 sq.m.) will be retail vacancy it is considered appropriate to adjust the indicative capacity figures as set out within Table 6.12 above. Of this 25% retail vacancy figure it is assumed that 2/3's of this floorspace (7,364 sq.m.) will be occupied by comparison floorspace and the remaining 1/3 (3,682 sq.m.) will be occupied by convenience floorspace. The floorspace potential figures as set out in Table 6.12 are reduced in Table 6.16 below to address this objective.

Table 6.16: Indicative Floorspace Potential		
	2011	2022
Convenience	3,557	43,173
Comparison	4,629	104,439
Bulky Household	288	57,555

Source: Table 6.12, minus 25% of total vacancy set out in Table 6.14, 2/3's of which will be occupied by comparison floorspace and 1/3 will be occupied by convenience floorspace.

6.8 Conclusion

6.8.1 Cork City and Cork County Council will have regard to the findings of the capacity assessment in assessing planning applications. In considering the potential for additional retail floorspace within the Metropolitan Area it should be noted that the floorspace potential figures outlined in Table 6.16 are considered as indicative of the scale of new floorspace required to meet the needs of existing and future population and expenditure in the Metropolitan Area. These figures may be subject to further updating in the future preparation of individual town development or local area plans. Additional new floorspace may be proposed and this could replace some existing outdated or poorly located retail floorspace. The role of a centre in the retail hierarchy, the location and quantum of retail floorspace within the centre will be the key considerations.

6.8.2 A case by case consideration of the relevant pipeline and vacant floorspace will be necessary in assessing future applications for retail within the Metropolitan Area having particular regard to the extent and location of extant permission in that location. Existing vacancy levels within individual centres are not fixed, they vary significantly in terms of location and format and will change over the lifetime of the retail study. In this regard it is considered that the most appropriate approach to dealing with vacancies is through the development management process. Key considerations in assessing future planning applications is the location and quantum of the proposed retail floorspace. It is an objective of the Study to significantly reduce retail vacancy levels in the short term by 50% of which half should be

occupied by retail uses (11,046 sq.m.) and the remaining 25% occupied by non-retail uses including retail services. The appropriate redevelopment and revitalisation of town/city centre lands will continue to be promoted as a priority.

- 6.8.3 The distribution of the above floorspace between the individual settlements within the Metropolitan Area is considered in Chapter 7 of the retail study. This distribution will reflect the existing and projected population in the Metropolitan Area and the identified retail hierarchy. Chapter 7 therefore identifies the retail hierarchy for the Metropolitan Area and considers the distribution of floorspace in this regard.

CHAPTER 7: RETAIL HIERARCHY AND THE FUTURE DISTRIBUTION OF FLOORSPACE

7.1 Introduction

7.1.1 The purpose of this chapter is to set the retail hierarchy within the Metropolitan Area. The strategy for the future distribution of retail floorspace is also detailed.

7.2 Retail Hierarchy

National Level

7.2.1 The principle of a hierarchy of retail centres informs the consideration of zoning for retail developments in development plans and is an essential component of a retail study.

7.2.2 The national retail hierarchy is set out in the Retail Planning Guidelines 2012. It reflects the settlement structure of the State.

7.2.3 The Retail Planning Guidelines 2012 identify four tiers of shopping provision within the national hierarchy. These are (1) Metropolitan, (2) Regional, (3) Sub-Regional (including District Centres within larger urban areas) and (4) Small Towns and Rural Areas. They also recognise that the four classifications are indicative and the functions provided by each tier overlap in some respects.

7.2.4 Cork City Centre is identified as a Metropolitan Centre. The guidelines note that the:

“Cities of Cork, Limerick/Shannon, Galway and Waterford provide a range of high-order comparison shopping which is largely unmatched in smaller cities and towns.”

7.2.5 In this regard, the primacy and retail function of Cork City Centre, a Metropolitan Centre should be protected and promoted to ensure it retains its position in the national hierarchy. This needs to be acknowledged and recognised in the development plan policies covering the City and County.

The Role of the Development Plan in Defining the Retail Hierarchy

7.2.6 The formulation of the retail study for the Metropolitan Area should ensure that policies and proposals are consistent with the Retail Planning Guidelines 2012. The Development Plans for both City and County should set out the hierarchy of centres and a strategy for the location of retail development. In particular the Guidelines state that development plans should outline the level and form of retailing activity appropriate to the various components of the settlement hierarchy in the core strategy.

The Retail Hierarchy of Metropolitan Cork

7.2.7 In determining the retail hierarchy the following principles were considered:

- Strategic Guidance at a national, regional and county / city level;

- The need to protect and enhance the importance of Cork City Centre as the principal urban centre and retail destination in the County and Region and also to protect the important more localised functions of the significant town centres in the Metropolitan Area including Middleton, Cobh, Ballincollig and Carrigaline as well as the established district centres of Mahon, Wilton, Douglas, Blackpool and Ballyvolane (it is acknowledged that Ballyvolane does not currently operate as a fully functioning district centre. It is however, a designated district centre in the current City and Blarney EA Plans);The distribution of future retail floor space relates to the identified existing and future retail hierarchy in the Metropolitan Area and should be appropriate to the scale and character of the centre;
- The distribution of future retail floorspace should be linked to the Core Strategy, settlement hierarchy and future distribution of population growth within the Metropolitan Area;
- The principles of sustainability should be adhered to and future retailing should be concentrated as far as practicable in centres that are served by public transport;
- The need to facilitate competitiveness and innovation in the retail industry.

7.2.8 The proposed Retail Hierarchy is illustrated in Figure 7.2.1 below.

Table 7.2.1: Retail Hierarchy					
Level	Centre	Retail Hierarchy			
Level 1	Metropolitan	Cork City Centre			
Level 2	Large Metropolitan Towns	Ballincollig, Carrigaline, Cobh and Midleton	Level 2	District Centres	Blackpool, Douglas, Wilton, Mahon Point, Ballyvolane*, Cork Docklands**, Hollyhill***
Level 3	Small Metropolitan Towns	Carrigtwohill****, Glanmire, Passage West, Blarney, Monard*****			
Level 4	Neighbourhood centres and large villages	Bishopstown, Bishopstown Court, Blackpool Village, Hollyhill, Tory Top Road/Curragh Road, Blackrock Hall (Ballinaure), Togher / Clashduv Road, Mount Agnes Road, Avenue de Rennes, Skehard Road, Mayfield, The Lough, Cork Docklands Designated Neighbourhood Centres**, Tower, Little Island, Grange Road and villages within the Metropolitan area.			
Level 5	Local centres, corner shops and small villages				

ane is identified as a district centre to serve the northern suburbs of Cork City in accordance with the current City Development Plan and the land use zoning contained in the Blarney Electoral Area Plan. It is envisaged that the future expansion of retail floorspace in this area will be subject to a co-ordinated approach between Cork City Council and Cork County Council.

**Cork Docklands: The future development of Cork Docklands District Centre and Neighbourhood Centres is to be in tandem with the planned population growth and development of this area.

***Hollyhill currently operates as a neighbourhood centre. It is considered that it has the potential to

develop to a district centre primarily based on convenience retailing and services in the initial phase.

*****Carrigtwohill is a small Metropolitan Town but has been planned to develop to a large Metropolitan Town over the medium to long term due to its location on the Cork to Midleton Train line.*

***** Monard: Retailing will be provided at an appropriate level to serve this planned new settlement as it develops.*

Level 1 Metropolitan

- 7.2.9 Cork City Centre is the principal urban centre in the county and region and forms the first tier within the retail hierarchy. The City Centre exhibits a number of higher order retail, service and specialist functions not found elsewhere in the County and Region. It also has a good range of convenience and comparison shopping as well as cultural and entertainment facilities. The City Centre has a high quality urban realm and is a pleasant place to shop. The City Centre should be the prime focus for future development and in particular the development of high order comparison retail floorspace.

Level 2: District Centres and Large Metropolitan Towns

- 7.2.10 The second tier includes the existing and planned district centres in the Metropolitan area (Blackpool, Douglas, Mahon Point, Wilton, Ballyvolane, Hollyhill and Cork Docklands) as well as the Large Metropolitan Towns of Ballincollig, Carrigaline, Midleton and Cobh.

District Centres

- 7.2.11 District Centres are defined in the Retail Planning Guidelines as follows:

“Provides a range of retail and non retail service functions (e.g. banks, post office, local offices, restaurants, public houses, community and cultural facilities) for the community at a level consistent with the function of that centre in the core strategy. They can be purpose built as in new or expanding suburbs or traditional district centres in large cities or towns (page 54.)”

- 7.2.12 The existing district centres are generally characterised by a large convenience / comparison anchor, a range of mid to low order comparison outlets, local retail services, ancillary specialist convenience outlets, community and social facilities. Most of these centres serve a localised catchment and are primarily designed to serve weekly shopping needs. The exception to this is Mahon District Centre which has a wider and higher order range of comparison floorspace and an adjacent retail warehouse park. In this regard, the centre performs a different role and function to the other district centres within the Metropolitan Area as evidenced within the results of the household survey undertaken by Demographics Ireland to inform the retail study.

- 7.2.13 Ballyvolane has not developed fully as a district centre as yet and does not offer a range of

community and social facilities. It is envisaged that the centre will fulfil this role over the timeframe of the study. Hollyhill currently operates as a neighbourhood centre. It is considered that Hollyhill has the scope and capacity to develop into a district centre level facility at the lower end of the scale over the lifetime of the study. In the short term comparison floorspace should be limited. However, the centre would benefit by the development of a larger convenience anchor and an associated range of local retail services, facilities and further community and social infrastructure in order to facilitate the regeneration and environmental improvement of the area.

7.2.14 Generally, as outlined in the Retail Planning Guidelines 2012, District Centres should contain lower order comparison retail.

7.2.15 It is noted that all of the district centres would benefit from a greater range of retail services, community and social facilities in order to ensure that they fully meet the day to day needs of their local catchment. All would benefit from significant environmental improvements, greater accessibility, pedestrian permeability and urban realm improvements. Some centres which accommodate enclosed malls such as Blackpool, Wilton, Douglas Court and Douglas Village would benefit from greater animation while Mahon would benefit from a greater diversification of non-retail district centre uses. Any future redevelopment of these centres should seek to provide overall improvements to the existing centre in terms of a greater balance and mix of land uses and civic and environmental improvements. It will be important however, that the future development of district centres also takes cognisance of the role and function of the lower order neighbourhood centres which provide important day to day services and facilities and serve a local need.

Large Metropolitan Towns

7.2.16 With regard to the towns in the second tier, these perform an important sub county retail role and generally include a good range of convenience provision and a modest provision of comparison offer. Such towns generally serve a large rural catchment. It is envisaged that retail expansion in these settlements should be in line with the planned population increase for these settlements and should be focussed on the consolidation of existing retail cores and providing further key retail development in order to provide for enhanced choice and competition for consumers. A key objective should be to provide a greater diversity and range of retail uses in such towns.

Level 3: Small Metropolitan Towns

7.2.17 The small towns of Glanmire, Passage West, Blarney and Carrigtwohill, generally have a more limited retail role and function than those towns in the second tier. Retail representation is often limited to local convenience and service provision with limited comparison offer. Development in the future should be encouraged to locate within the identified core retail areas of these settlements in order to strengthen and consolidate the retail role and function of these centres. Retail development should be in accordance with the planned population growth of these centres.

Level 4: Neighbourhood Centres and Large Villages

- 7.2.18 Level 4 in the retail hierarchy consists of neighbourhood centres and large villages within the Metropolitan area. These centres function to provide important top up and day to day shopping and retail service requirements. Neighbourhood Centres play an important role in serving the needs of those without access to a car, particularly the elderly. They are typically characterised by limited and small scale convenience offer and other ancillary retail services. Such developments typically serve a localised catchment area of approximately 10 minutes walking distance.

Level 5: Local Centres, Corner Shops and Small Villages

- 7.2.19 The lowest level of the hierarchy relates to small local centres, small villages, corner shops and rural shops. Such local retail facilities provide a valuable local and walk in role and function to the local communities that they serve. Their role should be supported.

7.3 Distribution of Floorspace RequirementsDistribution of New Floorspace

- 7.3.1 Chapter 6 of the retail study identified the floorspace potential for the Metropolitan Area up to 2022. This section of the retail study considers the appropriate distribution of this floorspace between the individual centres within the Metropolitan Area in accordance with the retail hierarchy identified above.

Distribution of Convenience Floorspace

- 7.3.2 It is recommended that the distribution of convenience floorspace figures throughout the Metropolitan Area is allocated in accordance with population growth and the existing quantum of development currently provided within each centre and extant permissions.
- 7.3.3 A review of the population targets set out within the Council's Core Strategy suggest that 47% of growth would be appropriate for the City Council area and adjoining suburbs (Ballyvolane and Douglas) and the remaining 53% would be appropriately allocated to the rest of the Metropolitan Area. Table 7.3.1 below applies these population ratios to the total available floorspace figures.

Settlement	Existing Population (2011 Census)	Proposed 2022 Population	Difference in population	% growth allocation	Convenience Floorspace Allocation
Cork City and Suburbs, (including Douglas and Ballyvolane)	151,054	186,125	35,071	47%	20,291 sq.m.

Remainder of Metropolitan Area	138,685	177,766	39,081	53%	22,882 sq.m.
Total	289,739	363,891	74,152		43,173 sq.m.

Table 7.3.1: Convenience Floorspace Distribution

- 7.3.4 In considering the distribution of convenience floorspace within the Metropolitan Area, the Council will have regard to the population projections, the nature and quantum of floorspace currently provided within such centres and any extant permissions. At present approximately 60% of convenience floorspace is provided within the City Council Area and the Douglas and Ballyvolane Area and 40% is provided within the remainder of the Metropolitan area.
- 7.3.5 Within the City and Suburbs the focus will be on improving the range and quality of convenience floorspace in sustainable locations. It is noted that the southern suburbs of the city are better served in terms of convenience provision than the northern suburbs. In this regard it will be an objective of the Council to promote further convenience development in the northern suburbs.
- 7.3.6 There is also scope to enhance existing convenience offer in the northwest suburbs of the City and to strengthen and reinforce the retail function and role of the existing neighbourhood centre at Hollyhill in particular. Hollyhill has the potential to develop a range of retail services, facilities, enhanced social and community infrastructure and a wider convenience shopping role for the north-west suburbs. It is envisaged that Hollyhill has the potential to develop to a district centre over the life time of the study primarily focused on convenience retailing and services. Development in Hollyhill should be in tandem with significant improvements to the public realm and environment.
- 7.3.7 It is also envisaged that there will be a future requirement for convenience development in developing areas of the City and in particular the Docklands. There are a number of existing unimplemented permissions incorporating convenience and comparison retailing in Docklands.
- 7.3.8 It is evident that certain centres within the remainder of the Metropolitan Area could improve their current convenience offer. Whilst Cobh has good convenience retail representation at Ticknock, there is very limited “multiple” convenience representation in the town centre core where existing provision is limited to smaller symbol stores. In this regard, convenience provision within the town centre should be enhanced. Similarly, Passage West lacks a convenience anchor in the town centre. There is also potential for the further consolidation of convenience retail provision in Carrigtwohill considering its planned population growth. Convenience development will be promoted in these urban centres in order to improve competition choice and diversity in the retail market
- 7.3.9 Other centres such as Carrigaline and Midleton perform an important role in serving the retail needs of a large residential catchment and additional convenience floorspace will also be promoted in these centres. For Monard, it is envisaged an appropriate scale of that convenience retailing will be provided as part of the new settlement. There is scope for additional convenience floorspace within Glanmire and Blarney. Further modest provision in these centres would reinforce their retail role and function to their local catchment. In

relation to Ballincollig, there is an extant permission for a large convenience development adjacent to the town core. It is likely that if this store is completed, that the town will be very well served by convenience retail provision.

Distribution of Comparison Floorspace

- 7.3.10 There are a number of options for the distribution of new comparison floorspace within the Metropolitan Area up to 2022. In preparing this assessment regard was had to the methodology adopted for the distribution of retail floorspace adopted within the 2008 Cork Strategic Retail Study. The study sets out 3 scenarios for the distribution of comparison floorspace (1) in accordance with market demand, (2) in line with population change and (3) a combination of both. A similar approach to that adopted within the 2008 study is replicated in Table 7.3.2 below for comparison floorspace.
- 7.3.11 **Scenario 1** allocates new floorspace in accordance with the market shares identified within the household survey undertaken to inform the retail study. This scenario is in line with current market demand as there is a requirement to develop retail floorspace in the most popular locations. Table 7.3.2 demonstrates that under this scenario a large proportion of floorspace is allocated to the City Centre and existing suburban district centres. The existing outflow of 1.6% from the Metropolitan Area is distributed between the City Centre (0.6%), Suburban District Centres (0.5%) and the remainder of the Metropolitan Area (0.5%).
- 7.3.12 **Scenario 2** allocates new floorspace in accordance with population increases envisaged for each centre in accordance with the City and County Council’s core strategy. Such an approach was adopted for the distribution of convenience floorspace. While it is plausible to apply such an approach for convenience floorspace, there is a clear need to consider the role and function of individual centres within the Retail Hierarchy in the distribution of comparison floorspace.
- 7.3.13 In considering the location of future comparison floorspace it is fundamental that the City Centre should remain the priority location for comparison shopping reflecting its role as a designated Gateway City within the National Spatial Strategy. In this regard Cork City centre is the primary retail centre in the Metropolitan Area and in line with its designation as a gateway City, should continue to be the focus for most comparison retail development within the catchment area. In order to reflect the prominence of the City Centre, the City Centre is kept at 60.4% (i.e. 59.8% market share plus 0.6% from outflow) in accordance with its existing market share. The remaining floorspace is then distributed based on an allocation of 40% to the City and Douglas zone and 60% to the remainder of the Metropolitan Area in accordance with proposed population increases.
- 7.3.14 **Scenario 3** allocates floorspace based on an application of an average of Scenarios 1 and 2. This scenario provides for a combination of market share and future population increase and of the three options is considered the most appropriate option for the distribution of comparison floorspace.

Table 7.3.2: Comparison Floorspace Distribution
Scenario1: Comparison Market Share

Cork City Centre	60.4%	63,081
Suburban Centres (including Docklands)	31.9%	33,316
Rest of Metropolitan Area	7.7%	8,042
Scenario 2: Population Distribution		
Cork City Centre	60.4%	63,081
Suburban Centres (including Docklands)	15.8%	16,501
Rest of Metropolitan Area	23.8%	24,857
Scenario 3: Average of Scenarios 1 and 2		
Cork City Centre	60.4%	63,081
Suburban Centres (including Docklands)	23.9%	24,961
Rest of Metropolitan Area	15.7%	16,397

Commitments and Vacancy

7.3.15

When considering the future allocation of the above floorspace, regard must also be had to the extent of existing vacancy within the core areas of towns within the Metropolitan area as well as the extent of unimplemented permitted pipeline floorspace. As detailed in section 6, it is an objective of the study to significantly reduce core retail area and district centre retail vacancy levels by a minimum of 50% in town centre areas of which at least half (11,406 sq.m.) should be occupied by retail floorspace. Cognisance of this objective has been had in the capacity assessment undertaken. Unimplemented permitted floorspace (Pipeline floorspace) has not been included within the capacity assessment. It will be important however that both vacancies and commitments are considered on a case by case basis when considering future applications for significant retail floorspace. The extent of comparison pipeline floorspace and vacant floorspace in the City and Metropolitan Towns is detailed in tables 7.3.3 and 7.3.4 below.

	Net sq m	Bulky Household	Comparison	Convenience
Cork City	26,528	1,630	24,410	488
Docklands	16,418	4,220	6,451	5,747
Northern Suburbs	572	0	-141 ³⁴	714
Southern Suburbs	3,128	0	1,170	1,958
Mahon	-197	0	-242	45
Blackpool	8,885	6,842	2,043	0
Wilton	10,609	0	8,296	2,313
Douglas	2,102	0	1,606	496

³⁴ Minus figures occur due to change of use in floorspace from retail to non-retail use.

Ballyvolane	1,866	0	1,893	-27
Bishopstown	4,000	2,000	2,000	0
Ballincollig	3,322	0	1,479	1,843
Midleton	5,920	0	3,590	2,330
Carrigaline	1,170	0	0	1,170
Carrigtwohill and Fota Retail Park	18,127	10,474	1,105	6,548
Total	102,450	25,166	53,660	23,625

Table 7.3.4: Core Retail Area and District Centre Vacancy Levels

Centre	Total Floorspace sq.m.	Total Vacant Floorspace sq.m.	% Vacancy
Cork City Centre	118,117	20,805	18%
Ballincollig	31,619	6,113	19%
Blarney	3,481	162	5%
Carrigaline	10,023	986	10%
Carrigtwohill	2,023	884	44%
Cobh	2,593	608	23%
Glanmire	3,476	663	19%
Midleton	9,632	2,706	28%
Passage West	636	434	68%
Douglas ³⁵	24,054	4,820	20%
Ballyvolane ³⁶	6,936	390	6%
Blackpool	18,617	2,971	16%
Wilton	11,294	1,005	9%
Mahon	33,161	1,632	5%
Total	275,662	44,181	16%

7.3.16

T

on retail floorspace:

curring resulting in a net loss of floorspace

³⁶ For Ballyvolane, Mahon, Blackpool and Wilton – core retail areas have not been defined. Vacancy figures relate therefore to entire centre.

City Centre

7.3.17 In considering the location of future comparison floorspace it is fundamental that the City Centre should remain the priority location for comparison shopping reflecting its role as a designated Gateway City within the National Spatial Strategy. Within the City Centre there are a number of key development sites which have extant permissions for redevelopment, particularly those at Grand Parade. These sites should be prioritised for redevelopment. There are also a number of prominent vacant retail units including much of the Cornmarket scheme. When considering proposals in other locations for comparison development the potential implications for the regeneration of key opportunity sites in the city centre needs to be considered.

7.3.18 The allocation of retail floorspace outside of the City Centre will be based on the role of each centre within the retail hierarchy, population targets, current market shares and the quality of existing comparison floorspace within each centre. New developments/permissions should have regard to population and economic growth.

District Centres and Metropolitan Towns

7.3.19 The Planning Authorities need to take a cautious approach in permitting significant retail schemes within the district centres and the large metropolitan towns in order to protect the primacy of Cork City Centre within the hierarchy with regard to comparison retailing. It is envisaged however, that the suburban district centres and Metropolitan Town Centres shall continue to provide a wide range of convenience floorspace as well as appropriate levels of lower order comparison floorspace.

7.3.20 The provision of comparison floorspace in the city suburbs will be more evenly distributed by providing new floorspace (as indicated in table 7.3.2) at the ratio of 40/60 to the Northside /Southside respectively. No suburban centres should have a greater amount of comparison floorspace than the current largest district centre (Mahon), which will not grow significantly over the period of the retail study. Comparison floorspace may be provided not only within district centres but also to a limited degree within neighbourhood and local centres, at an appropriate scale to the respective centre. Future retail expansion within the Suburban District Centres will be carefully controlled so that they progressively develop as mixed use urban centres and that the planned development of Cork City Centre and the Metropolitan Towns can be successfully achieved.

7.3.21 Docklands: There are a number of significant extant permissions in the Docklands area. The Docklands is an area targeted for significant redevelopment and regeneration. Comparison retail development of an appropriate scale commensurate with the planned population growth of this area will be encouraged. The strategy identifies a need for a district centre in the South Docklands to be developed in tandem with future population growth and development.

Northside District Centres

7.3.22 Blackpool: Mixed use development should be encouraged within Blackpool to include retail and non-retail uses. It is an objective to consolidate Blackpool and provide a much

improved urban environment and a greater mix of uses. In Blackpool there is potential for comparison expansion to deliver improvements in urban design and linkages as explained in Section 8.

7.3.23 Ballyvolane: It is envisaged that the future expansion of retail floorspace in Ballyvolane will be subject to a co-ordinated approach between Cork City Council and Cork County Council. Demand for any additional comparison retail floorspace in Ballyvolane will be driven by the planned future population of the Ballyvolane masterplan area as per the Blarney Electoral Area Local Area Plan. The delivery of additional comparison floorspace in Ballyvolane must also be in tandem with a range of other ancillary retail services, community and social infrastructure in order to facilitate the development of Ballyvolane into a fully functioning district centre.

7.3.24 Hollyhill: It is noted that the City Development Plan Core Strategy identifies the potential for an additional district centre in the north west of the City. It is considered that over the lifetime of the study that Hollyhill has the potential to develop to a district centre with a substantially improved convenience offer, a broad range of retail services, modest comparison provision as well as improved social and community infrastructure. The development of Hollyhill should be coupled with significant environmental improvements to the public realm and should facilitate the regeneration of this area.

Southside District Centres

7.3.25 Douglas: Survey results show that Douglas has lost its comparison market share and has high levels of vacancy both within the core retail areas and adjoining areas. The priority for Douglas is to reduce the current levels of vacancy and to provide for a modest increase in comparison floorspace to help restore market share. Any redevelopment or expansion of Douglas must be coupled with improvements to the public realm in order to enhance the overall range and mix of uses in the centre. The centre would also benefit from improved linkages. The Douglas LUTS will provide a framework for the future development of the Douglas District Centre.

7.3.26 Wilton should be prioritised for redevelopment. The centre has potential to augment its comparison offer in order to reinforce its role and function and facilitate its regeneration. Mixed use development should be encouraged within this centre to include retail and non-retail district centre uses. . Any redevelopment or expansion of Wilton must also be in tandem with improvements to the public realm.

7.3.27 Mahon: No significant expansion of comparison floorspace in Mahon is envisaged over the lifetime of the study. In contrast with other district centres within the Metropolitan Area performs a primarily comparison role. The objectives for Mahon include a greater mix of non - retail uses in order to enhance its district centre functions.

Metropolitan Towns

7.3.28 The aim of the Metropolitan towns is to meet the retailing needs of their respective

catchment population while reflecting their role and function within the retail hierarchy. Of the Large Metropolitan towns it is considered that Midleton has the most potential to accommodate additional comparison floorspace. The town serves a significant rural hinterland and existing comparison floorspace within the town is primarily characterised by independent retailers. The town also has a low market share for comparison goods when compared with its convenience goods market share.

7.3.29 Cobh is seen as having potential for additional floorspace including the tourism related market. There are significant vacancies in the town centre although it is recognised that this mostly comprises smaller units. There is also potential for expansion of additional comparison retail floorspace within Carrigaline.

7.3.30 In terms of Ballincollig, as can be seen from table 7.3.4 above, there is significant vacancy within the core retail area of the town with over 6,000 sq. metres of vacant floorspace as well as some significant pipeline. Much of this development is within the Ballincollig Town Centre and Old Quarter developments. In this regard, a cautious approach should be had to the development of further large scale comparison floorspace in the town pending the occupation of these vacant units.

Small Metropolitan Towns

7.3.31 It is envisaged that the development of comparison retail floorspace within the small metropolitan towns of Glanmire, Passage West, Blarney and Carrigtwohill will be limited over the period of the study to small scale and localised provision commensurate with the population targets for each centre.

Retail Warehousing / Bulky Goods

7.3.32 The quality and provision of retail warehouse / bulky goods facilities throughout the Metropolitan area varies considerably. In some locations, retail parks have been highly successful such as those at Mahon and Blackpool, whereas others have struggled to attract tenants such as the East Gate Retail Park. In addition a number of ad-hoc retail warehouse have developed and there is a noticeable trend where retail warehouse activity has emerged within existing business and industrial parks. In some locations such as Carrigaline, town centre uses and convenience retailers have located in industrial/business parks which is undesirable. Table 7.3.5 provides a summary of retail warehouse development in the Metropolitan area.

7.3.33

Table 7.3.5: Bulky Household Retail in the Metropolitan Area	
Location	Bulky Household Floorspace
Cork City Centre	6,860
Mahon District Centre & Retail Park	13,384
Blackpool DC & Retail Park	3,408
Ballyvolane DC	924
Douglas DC	2,431
Cork City Suburbs Retail Warehouse Floorspace	46,724
Blarney	764
Glanmire	175
Carrigtwohill	5,029
Carrigaline	6,154
Midleton	7,407
Cobh	1,533
Ballincollig	2,784
Little Island	8,917
Other Rural	3,783
Total	110,277

ent demonstrates that there is potential for additional retail warehouse development over the period of the study (57,555 sq. m. by 2022). The key consideration however, will be the appropriate and sustainable location for such retail activity. As advised by the Retail Planning Guidelines there should be a presumption against the further development of out of town retail parks. Such development should be concentrated in or adjacent to the District Centres and large Metropolitan Town Centres. Such development where possible should be located as close as possible to the town centre to ensure the potential for linked trips and commercial synergy. Certain sites within City's Docklands may also be appropriate for such development.

7.3.34

It is important that the range and types of goods sold from such developments should clearly be restricted to bulky goods as defined in Annex 1 of the Retail Planning Guidelines 2012. Appropriate conditions should be imposed regarding any application relating to an existing or proposed retail warehouse development in this regard. Retail floorspace devoted to the sale of ancillary items associated with the primary bulky household nature of the store should not exceed 20% of the total net retail floorspace of the retail unit.

7.3.35

There may also be scope for the development of an innovative type of large scale retail warehouse in Cork. As detailed in the RPG's the scale of such outlets requires a regional, if not national, population catchment. In this regard a proposal for such a retail warehouse development in excess of 6,000 sq. metres may be appropriate in Cork Gateway. Specific criteria regarding such developments are set out in the RPG's and in particular such developments must accommodate a range of bulky goods together with a range of customer facilities which require a national population catchment. Furthermore such developments must not adversely affect the efficiency of the national road network and it

must be demonstrated that traffic volumes can be accommodated within the design assumptions for such roads taking account of the opportunities for encouraging a modal split towards more sustainable travel modes. Such development should also be served by existing or planned public transport services. The potential impact of a retail warehouse in excess of 6,000 sq. metres will need to be carefully examined in the context of this guidance.

- 7.3.36 There should be a presumption against the development of retail warehousing locating in industrial estates and business parks. Such developments are often done in a piecemeal and ad hoc manner resulting in poor environmental quality, have poor public transport access and have a potentially negative impact on the vitality and viability of town centres.

Conclusions

- 7.3.37 The distribution of future floorspace must have regard to the identified retail hierarchy as set out within this chapter and the settlement strategy set out in the Cork Area Strategic Plan. The figures set out above are indicative of the scale of new floorspace required to meet the needs of existing and future population and expenditure in the Metropolitan Area. Additional new floorspace may be proposed and this could replace some existing outdated or poorly located retail floorspace. The key consideration is the location and quantum of new floorspace.

- 7.3.38 It is important that regard is had to the extent of vacant and pipeline floorspace within each centre, and where an application for significant retail is proposed, the applicant must demonstrate the appropriateness of the development in the context of existing vacant floorspace and extant permissions.

- 7.3.39 A number of potential opportunity sites for the development of convenience and comparison retailing are identified later in Appendix 4 of the report. This includes sites in the principal towns and district centres in the Metropolitan area as well as in Cork City Centre. It is noted that some of the sites which have an extant permission for extensive retail development have not been implemented. The Planning Authority will work closely with landowners and retailers and other interested parties to help bring forward these sites for development. The development or redevelopment of key sites within Cork City Centre and the other identified Centres in the Metropolitan Area for retail development in order for the County to compete as a high level retail destination is of paramount importance. In this regard, Cork City Centre will be the target and the focus for higher order comparison retailing. Enhanced retail provision, particularly convenience provision will also be targeted in the City, District Centres and key metropolitan towns such as Cobh, Passage West and Carrigtwohill.

- 7.3.40 It is noted that there are extant permissions for a number of significant retail schemes in the Metropolitan area. Many of these sites are intrinsically linked to the city/town core area and their development for appropriate retail provision would substantially improve the retail role and function of these centres. Such extant permissions will be assessed by the local authority in considering the requirement for additional retail floorspace within a particular centre. Likewise existing vacancy levels will be considered by the Council in assessing each application.

CHAPTER 8: POLICIES AND RECOMMENDATIONS

8.1 Introduction

8.1.1 The purpose of this chapter is to set out key policies and recommendations in terms of the future development of retail facilities in the Cork Metropolitan Area.

8.1.2 The chapter examines the following issues:

- General policies and recommendations for improvements to the retail sector in the Metropolitan Area.
- Key recommendations for Cork City Centre.
- Key recommendations for the Metropolitan Towns.
- Key recommendations for the District Centres.
- Key recommendations for Neighbourhood Centres.
- Key recommendations for Retail Warehousing development.

8.2 General Policies and Key Recommendations for Improvements to the Retail Sector in the Metropolitan Area

8.2.1 This section will summarise the general appropriate policies which are recommended for implementation by Cork City Council and Cork County Council to encourage and foster retail development and vitality and vibrancy in the City Centre and in the principal towns and district centres in the Metropolitan area. Whilst it is acknowledged that the development of retail facilities is largely dependent on market demand and retailer requirements, it is envisaged that the following general policies will help promote Cork City Centre, the District Centres and Metropolitan town centres as vibrant and attractive areas thus encouraging their growth and development for retail, retail service, professional service and other complementary land uses.

8.2.2 Detailed below are a number of general policies that should be implemented to encourage and foster retail development in the Metropolitan Area. In this section it should be noted that the term Planning Authority refers to both Cork City Council and Cork County Council as well as Cobh and Midleton Town Councils.

Policies

- All retail development should be in accordance with the Guidelines for Planning Authorities Retail Planning (DECLG, 2012) and the Metropolitan Cork Joint Retail Study.
- Retail development should be of a scale which is appropriate to the level of each centre within the retail hierarchy. The scale of such provision should be cognisant of the retail role and function of the centre.
- To 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 National Spatial Strategy.

- To support the vitality and viability of District Centres in the Metropolitan Area 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. There should be an emphasis on lower order comparison floorspace in such centres in order to ensure the primacy of the City as the primary location for higher order comparison development.
- To support and promote the retail role of neighbourhood centres and local shops which provide an important service at the local level.
- To support the vitality and viability of the key centres in the Metropolitan Area 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.
- To support the development of core retail areas as identified within the Retail Study through a significant reduction in vacant floorspace and reinforce the role and function of the core retail areas by the appropriate development of identified opportunity sites.
- To adhere to the provisions of the sequential approach in the consideration of retail applications for developments located outside of core retail areas.

Key Recommendations

- 8.2.3 It is the objective of the planning authorities to implement the following key recommendations for the Metropolitan Area in order to ensure the continued vitality and viability of the City Centre, District Centres and Metropolitan town centres, including:

Developing and Promoting Key Town Centre Sites

- 8.2.4 A number of opportunity sites are identified in Appendix 4 of this retail study. Strategies will be prepared for their future development. These sites are identified as appropriate locations for future retail development and their development would strengthen the identified core retail areas. It is recognised that city/town centre sites in many instances form part of a tight urban grain and their redevelopment can often be complex to develop due to issues such as ownership, access, conservation and archaeological constraints. The location rather than the precise boundary of the sites have been identified in the study.

- 8.2.5 Notwithstanding the above and in accordance with the guidance set out within the 2012 Retail Design Manual, the Council should support, facilitate and encourage the appropriate development and delivery of key city and town centre sites. Such an approach was successfully adopted for the delivery of the Opera Lane development within the Cork City Centre, a development which since its delivery has attracted national and international brand retailers and has significantly added to the retail offer of the City Centre and reinforced its role as the main higher order comparison centre within the County. The continued delivery of sites which have the potential to strengthen the role and function of identified City and Town centres should be encouraged and facilitated.

Ongoing Environmental Improvements to the Public Realm

8.2.6 Cork City Centre and many towns in the Metropolitan area have benefited from an ongoing programme of environmental improvements, maintenance and enhancement over the past number of years.

8.2.7 The planning authorities should continue to promote and encourage environmental improvements to the public realm in the key urban centres in the Metropolitan area including Cork City Centre and the district centres. A public realm strategy should be prepared for all key urban centres in the Metropolitan area. This should address not only ongoing physical works required to improve the public realm but could also address issues such as:

- Illumination strategy;
- Implementation of cohesive, attractive and informative pedestrian signage;
- Application of street care audits highlighting works needed including cleaning, graffiti removal etc.;
- Litter management;
- Implementation of planting and floral schemes;
- Installation of public art/murals etc.;

Infill Development

8.2.8 Consideration should be given to the design and form of infill development within the secondary and peripheral retail streets in Cork City and the principle town centres in the Metropolitan area. At these locations it can be difficult to attract viable retail development. In this regard, one option is to seek to ensure, through the development management process, that the ground floor units of such infill city/town centre developments (particularly those with an active street frontage) are designed with flexibility, for example higher floor to ceiling heights, to enable their easy conversion to retail or other commercial use if the demand so necessitates. This is to avoid the development of ground floor retail units which remain vacant with no active use which can be detrimental to the vitality and viability of the centre. The feasibility of developing alternatives such as live work units and professional services/own door offices in such infill schemes should also be encouraged by the planning authorities.

8.2.9 It is acknowledged that in some town centres that different streets have different characteristics and that in some cases it may be appropriate for the local authority to prescribe a different approach to their future development. In some instances peripheral streets have lost their retail role and function and it may be more appropriate to promote a different land use strategy at such locations such as the conversion of former retail premises to residential use.

8.2.10 In recently completed mixed use schemes where high rates of vacancy exist at ground floor level, the planning authorities should adopt a flexible approach in considering alternative uses in these vacant units.

Promotion of Residential Development and Tourism Facilities in the City Centre and Town Centres

- 8.2.11 The development of future retail facilities, particularly in some of the more peripheral and declining areas of the Metropolitan Area is linked to the settlement strategy set out in CASP. This supports residential development in the central areas of Cork City and the principal towns in the Metropolitan Area. This pattern of consolidation will ensure that the City Centre and town centres become active living centres with the critical mass of population necessary to support a range of facilities and services.
- 8.2.12 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 Metropolitan area most notably the city centre, Midleton, Cobh and Blarney. The further promotion of cultural activities and events should be encouraged to draw visitors to such towns.

Revitalisation of Vacant and Derelict Properties/Shop Units

- 8.2.13 As noted within the health check assessment the down turn in the economy since 2008 has resulted in a significant amount of vacant retail floorspace throughout the Metropolitan Area. This is present at varying degrees within individual centre throughout the study area. Vacant units adversely affect the vitality and viability of city/town centres and can also have a negative visual impact on the retail core. It is an objective of the Study to significantly reduce retail vacancy levels by a minimum of 50% in town centres, of which 25% should be occupied by retail uses and the remaining 25% occupied by non -retail uses including retail services.
- 8.2.14 Throughout the Metropolitan area the planning authorities should ensure that development plans and local area plans include a clear expression of policy in favour of adapting existing property in town centre areas for retail and other town centre activities. In towns such as Ballincollig and Cobh where particularly high rates of vacancy prevail, proposals for new retail development outside the designated town centre would need to be supported by an assessment of vacant floorspace within the town centre and a statement demonstrating that it was not possible or practical to provide that retail floor space required by the developer within the town centre area. In this regard the planning authorities should actively promote the appropriate revitalisation of vacant and derelict properties and shop units.
- 8.2.15 As detailed in the Association of Town Centre Management Good Practice Guide on the Visual Affect of Vacant Units³⁷:

“Visually, vacant units can lead to perceptions of a high street with underlying problems such as high crime rate, a lack of investment and a lack of available goods and services. Consumers who believe there is a lack of activity happening on the high street might be tempted to shop elsewhere to the detriment of the surviving traders. Businesses who are looking to invest in an area might be sceptical of the potential to make a profit from any high street struggling. There is potential for a downward spiral if consumers and businesses go elsewhere.”

³⁷ Street Operations: The Visual Affect of Vacant Units; A Good Practice Guide, (January 2011), Association of Town Centre Management (UK)

- 8.2.16 In this regard, the planning authorities should encourage the development and re-use of vacant and derelict properties or alternatively consider measures to improve their visual appearance including short or interim measures. Measures that should be encouraged include:

Pop Up Shop

- 8.2.17 The utilisation of empty units as spaces to promote cultural and community events – visual, musical and theatrical applications. Examples include:

- Encourage local community groups/ artist groups/ art colleges to transform empty spaces/ empty windows so they become an attraction rather than an eyesore.
- Encourage artists etc to trial the use of empty units for a short period of time.
- Encourage temporary occupation of vacant units for uses such as charity shop, restaurant etc.

Promoting Innovation and Creativity

- 8.2.18 The promotion of innovation and creativity within city/town centres in relation to the use of streets, public spaces, vacant buildings and derelict sites for different public activities and events should be promoted by the council. Approaches such as the Lighter, Quicker, Cheaper philosophy advocated by groups such as the Project of Public Spaces encourages innovative and exciting new ways to develop public spaces at a low cost whilst increasing footfall and vitality. Examples of such initiatives include the use of public spaces and derelict sites for temporary art installations, pop up parks, giving existing buildings a face lift through low cost measures and utilising shopping containers and tensile structures to enable creative new uses and events.

Regulatory Guidance

- 8.2.19 At times there can be legal and / or planning implications to undertaking certain activities with regard the use and alteration of vacant units. This extends to the issue of when planning permission is required and who is liable to pay business rates etc.

- 8.2.20 In this regard the planning authorities should produce a simple straightforward information leaflet on any consents that may be required to undertake any of the above actions and initiatives. There should be clear guidance as to what types of works are considered exempted from the necessity to acquire planning permission or pay rates. Such an information leaflet should be disseminated through the Chambers of Commerce, local business associations, and City Council/Town Councils as well as on the planning authorities' web page.

- 8.2.21 In general there should be a presumption against development contributions on change of use applications, particularly if they relate to vacant premises. Exemption of levies and development contributions should also be considered for the redevelopment of premises above a shop unit in order to encourage the concept of "living over the shop". The development contribution scheme may need to be amended to reflect this.

After Hours Activity

- 8.2.22 The development of the evening and night time economy is an important part of any city/town centre/district centre and is essential in ensuring the vitality and viability of town centres, particularly after hours.
- 8.2.23 In this regard the integration of retail, leisure, restaurants and bars is essential to the promotion of a vibrant town centre and district centre. The planning authorities should encourage the development of mixed use schemes in order to encourage the night time economy, and initiatives such as Purple Flag accreditation scheme for the management of centres at night. .

Design and Shop Front Guidelines

- 8.2.24 The planning authorities should advocate a presumption against inappropriate shop front design and strict enforcement for unsympathetic and unauthorised signage and shop front fascia.
- 8.2.25 Development plans should include specific advice regarding appropriate shop front design. This should include guidance on the presentation of cohesive fascias – including guidance on colour schemes and quality standards. They should include proactive policies regarding the retention of traditional shop fronts and timber sash windows in upper floors. Specific guidance should also be provided in respect of signage and advertising.

Litter Management

- 8.2.26 Poor litter management, street cleaning and bin emptying can detract from a town centre and can have a significant adverse impact particularly from a tourist perspective.
- 8.2.27 The planning authorities should encourage and support measures to ensure street cleaning and bin management in all key urban centres in the Metropolitan area.

Development of Specific Derelict and Obsolete Sites

- 8.2.28 Dereliction, vacancy and obsolescence is evident in many of the key urban centres in the Metropolitan area and most notably in centres such as Passage West, Carrigaline and Cobh. The redevelopment of such properties should be promoted and encouraged. A simple action such as painting a derelict building can significantly enhance the aesthetic profile of a street.
- 8.2.29 In this regard, the planning authorities should encourage a co-ordinated programme for building maintenance and development, as well as the identification of specific buildings and sites that need to be targeted immediately in the Metropolitan area.

Festivals and Events and Street Markets

8.2.30 Festivals and events are critically important in enhancing the attractiveness of the city and town centres as places to visit. Such events can improve footfall and improve vitality and viability of town centres and encourage return visits. The planning authorities should support and encourage such events.

8.2.31 Markets can also play an important role in attracting footfall to a city/town centre. They are a critical part of the retail offer and can help generate significant footfall in town centres. Existing and potential markets should be supported and encouraged by the Planning Authorities.

Outdoor Seating

8.2.32 Temporary street furniture can be a beneficial addition to a city/town centre allowing customers to enjoy time outside during the summer. They can increase trade for all businesses by inviting people to spend more time in the town centre and encourage the growth of a café culture. However, if such seating is developed on an ad hoc basis it can be an obstruction and in some instances cause a nuisance. Temporary street furniture may also be of low quality and not fit with the existing character of the streetscape.

8.2.33 In this regard, the Planning Authorities should encourage and support the provision of outdoor seating in appropriate locations. The Planning Authorities should review its licensing charges for such outdoor seating areas to ensure that they are not prohibitive.

Rates Base

8.2.34 The Planning Authorities should investigate the potential of introducing a commercial incentive scheme to encourage the occupancy of vacant units in city/town centres in the Metropolitan area. Such a scheme would allow for a grant or reduced rates to be paid in respect of a vacant unit. The scheme could be prioritised for those centres that require most attention due to high rates of vacancy such as Cobh and Ballincollig.

Review Parking Strategy in the Metropolitan Area

8.2.35 Sufficient and affordable car parking in town centres is an important factor to their ongoing success and enables them to compete effectively particularly with out of centre development. It is noted during the health check survey that different car parking rates apply to different centres in the Metropolitan area, with some having no charges, or free parking for a certain period of time and others have an hourly rate. There is no consistency in this regard. It is recommended that the Planning Authorities carry out a review of the parking strategy in the key urban centres in the Metropolitan area to ensure a more coherent approach. The strategy should consider such issues as:

- Parking charges.
- Hours of operation.
- Scope for free parking on one key shopping day.
- Scope for free parking between 4 and 6 in the evening to encourage post school shoppers or a “Free after Three” parking campaign.

- Extend maximum on-street parking time to encourage visitors to spend longer in a town or city centre.
- Innovative parking systems such as park by text.
- Effective parking enforcement and policing.
- Measures to improve parking signage, direction and access.
- Measures to encourage people working in town centres not to park in key town centre parking spaces.
- Measure to improve safety and security of car parking areas such as CCTV.
- Provision of on-street pay and display machines.

8.2.36 Within the City it is unlikely to be feasible to provide all day free parking as this could have the negative consequence of encouraging commuter traffic to the City. However, innovative measures such as promoting reduced parking on certain days or during certain hours could be considered in order to promote increased footfall in the City Centre. The council could also investigate the feasibility of ring fencing a certain percentage of car parking revenue towards the development and funding of a City Centre Forum – see section 8.3 below. Such a measure is promoted by Retail Excellence Ireland who note:

“The funding of the town team or BID through a proportion of the car parking revenues would lead to a more active engagement between the town and potential visitors, thus potentially leading to increase car parking fees which in turn will result in a type of performance related remuneration paid to both the Local Authority and the Town Team or BID – in essence all boats will rise.”

8.2.37 It is noted that a park by text system operates in the City area. This is an innovative form of payment for parking. At the moment the system has a low penetration rate. In this regard the Council should promote and market the further development of this system.

Non Retail Use in the Retail Core

8.2.38 Non retail uses and the proliferation of certain land uses such as takeaways can detract from a town centre. Other uses such as retail services and bookmakers can create “dead frontage” and effect the vibrancy and vitality of a town centre. In this context, the planning authorities should ensure that there are clear policy objectives regarding such development in the City, County, Town and Local Plans.

8.2.39 In this regard there should be clear policies to retain the defined core retail areas of the city/town centre for primarily retail use, protect and enhance their retail function and ensure that any future new commercial and retail development reinforces its role as the core retail area of the city/town centre, by promoting the development of active ground floor uses and limiting the expansion of certain non-retail and inactive street frontages including financial institutions, betting offices, public houses and take aways/fast food outlets in the defined core retail areas.

8.3 Key Recommendations for Cork City Centre

8.3.1 Cork City has an active and vibrant city centre. Notwithstanding this, there are signs of

vacancy and obsolescence occurring, particularly on the peripheral and secondary retail streets. There has been an active programme of public realm improvements in the City in recent years. Continued investment in public realm improvement and traffic management will be essential to ensure that the City retains its competitive edge particularly in the face of increasing competition from other centres that have other benefits such as free parking. It will be necessary to continue to support and reinforce the role of the City Centre as the prime retail destination not only for the Metropolitan area and County, but for the wider region. In this regard the following specific recommendations are identified for Cork City Centre.

City Centre Forum

- 8.3.2 Centres such as Mahon and Douglas Village and Douglas Court provide consumers with a high quality and attractive destination, inexpensive or free parking, a strong retail mix, and other attractions together with well developed marketing initiatives. In contrast, city and town centres often have little or no active management. The City Centre has evolved organically, and needs to respond to the changing demands and needs of the consumer. For the City Centre to operate more effectively, it must have a clear vision of where it wants to get to and it needs co-ordinated planning and management to get there.
- 8.3.3 In this regard it is recommended that the City Council fully investigate the feasibility of establishing a City Centre Forum which may assist with addressing these issues.
- 8.3.4 Such a forum would comprise of all of the key stakeholders with a view to agreeing an approach to the future management and enhancement of the City Centre. The City Centre forum would be made up of representatives from the City Council, retailers, traders and other commercial sector interests. The best results will come from maximum collaboration at a local level. The role of the forum is to agree a strategic plan for the future management and enhancement of the core retail area of the City
- 8.3.5 The key objective of the forum would be to establish a well managed and marketed City Centre that is a pleasant, safe, clean and vibrant place to shop and do business. The forum would also establish a common budget to deal with such issues as advertising, streetscape improvements, training and support, event management and digital marketing. Innovative measures such as apportionment of a percentage of the City's car parking charges could be used to partially fund the forum. Issues such as branding, co-ordinated marketing campaigns, building a localised database of customers creating a distinct retail destination, promotion of a suitable retail mix, development of events and markets, accessibility, car parking, co-ordinated opening hours, loyalty cards etc. would also be addressed. Guidance on how to establish such a town forum or town team is provided in the Retail Excellence Ireland document "Town and City Management Framework".
- 8.3.6 The forum should also establish clear procedures for communicating with the City Council including one overall co-ordinating point of contact in the council who will be charged with responding to queries, concerns and issues raised as well as being a direct point of contact on specific issues such as street maintenance, litter management, lighting etc. Effective City Centre management by all key stakeholders will be essential in creating a well planned, well designed and effective City Centre.

- 8.3.7 As an alternative to a town centre forum, the council could consider the introduction of a more formalised BID (Business Improvement District). The key objective of the Bids scheme is to develop and implement a series of new and additional initiatives designed to both further promote and improve the trading environment for the area within the BID boundary in which ratepayers operate their business. It is also designed to improve the image of the City from a tourist perspective and improve the quality of life of residents and workers in the BID area. The role of the local authority in this process is to facilitate schemes proposed by groups of ratepayers. They ensure the scheme is appropriate and collect the money on behalf of the BID company.
- 8.3.8 In Dublin, the scheme has been successful in offering services such as enhanced street cleaning and maintenance and a dedicated team of street ambassadors providing tourist information in the City Centre. BIDS provide a whole new impetus for businesses to work with their respective local authorities and local residents, allowing for innovation and acumen to benefit everyone in an area.
- 8.3.9 In a Business Improvements District Scheme, a group of businesses are empowered, where a majority of those businesses agree, to raise a special contribution from all the businesses in the defined area to pay for the carrying out of complementary local services and improvements, within that defined area. The boundary of, and the range of local improvements to be carried out in the defined area of, a Business Improvements District Scheme are set out in a detailed business plan which is developed by the business community in association with the local authority.
- 8.3.10 The local authority has the ultimate say in whether a BID scheme goes ahead – in particular, it must ensure that the interests of the local community are protected. Before a council takes a decision on a BID proposal, a plebiscite must be held among the business community in the BID area. Commencement of the BIDS provisions coincides with the making of Regulations which will govern the holding of a plebiscite. Once approved by the council, following a successful plebiscite, a specially established BID company will have responsibility for implementing the provisions of a BID scheme, with the local authority playing a key role in any such company.
- 8.3.11 The ethos of BIDS is that it would provide services in an area that would add to, and not substitute for, those services already provided by the local authority.
- 8.3.12 The BIDs approach provides the opportunity to lever in private sector funding for the improvements and their subsequent management in addition to sources of local authority funding.

Improvements to the Public Realm

- 8.3.13 The improvements to the public realm in Cork City Centre in recent years are outstanding and have made a very significant contribution to improving the quality of the environment and streetscape and the experience and attraction of the City Centre. It is important that the public realm is constantly maintained and enhanced through initiatives such as street cleaning, footpath repair, mobility and pedestrian improvements, public seating, public art, derelict site maintenance and hard and soft landscaping.

- 8.3.14 The Council should continue to roll out these public realm works to other parts of the City Centre including Mc Curtain Street, St. Peters and Paul Place, Perry Street, Drawbridge Street, Grafton Street, Robert Street, St. Augustine Street, Washington Street and the city quays. Ongoing maintenance and improvements to existing streets such as Princess Street are also required.
- 8.3.15 There is an extant permission for the future redevelopment of the Beamish and Crawford site. In this context, future improvements to Tuckey Street should be considered as this is the main pedestrian link from this site to Grand Parade and St. Patrick's Street.
- 8.3.16 In order to ensure an appropriate order of priority for future environmental works, the Council should prepare an Environmental Improvement Scheme for the core City Centre area. This should include potential for further pedestrianised areas, high quality paving and street furniture, tree planting, flower baskets, sculpture, water features, lighting and so on. The needs of those with disabilities should be integral to the design process for pedestrianisation and improvement schemes. The scheme should also include guidance regarding signposting and traffic management hardware as well as measures regarding future maintenance and management.
- 8.3.17 It is noted that Cork City Council is carrying out a review of the existing traffic management system in the City Centre. The proposed City Centre Movement Strategy (CCMS) Plan will design and develop a strategy for the efficient and effective movement of all transport modes in the City Centre including normal traffic, buses, taxis, deliveries and cycling. The primary purpose of the CCMS Plan is to facilitate the general vibrancy of Cork City Centre to promote sustained economic growth, to deliver a much more attractive environment for shoppers, visitors and tourists and to help encourage sustained inward investment. Proposals include maintenance of good quality access to the City Centre parking facilities, enhancements to the bus network and improvements to the pedestrian environment. The Environmental Improvement Scheme should be cognisant of the recommendations of the CCMS Plan.
- 8.3.18 The continued refurbishment/upgrading of the main streets, laneways and thoroughfares in the City will further enhance the vitality and attractiveness of the City's retail core by improving the shopping environment and encouraging greater pedestrian permeability. The report should identify areas where there is scope for better connectivity, legibility and linkages.
- 8.3.19 The report should also consider any potential opportunities for greater pedestrianisation and in particular the pedestrianisation of St. Patrick's Street during core business hours and on Saturdays.

Area of Special Planning Control

- 8.3.20 It is noted in the health check assessment that St. Patrick's Street is one of the prime retail areas of the City with the highest representation of large anchor department stores as well as a number of well known high street brands and national and international multiples. It is noted however, that in some areas of the street, in particularly at the western end, the

retail role has become a little eroded. This area has a higher prevalence of vacancy and a greater degree of retail service representation. This is an undesirable trend as it can detract from the prime retail function of the street. This trend may be due to the economic downturn and the delay in the implementation of some key redevelopment schemes at Patrick Street and Grand Parade.

- 8.3.21 In this regard, the council should consider the introduction of an Area of Special Planning Control on St. Patrick's Street. To facilitate this, consideration should be given to creating an Architectural Conservation Area along St. Patrick's Street. It would apply to all retail properties with a direct frontage to this street.
- 8.3.22 The purpose of a Special Planning Control Scheme is to set out development management measures in order to achieve an appropriate mix and balance of uses in the prime retail area. In particular, it addresses planning exemptions relating to changes within the same use classes including the de-exemption of specific uses such that a change of use to a particular type of shop will require permission. This would allow the council to prohibit undesirable retail uses in the prime retail pitch such as cash for gold shops, sex shops, mobile phone shops and discount shops. It would also enable the council to control a proliferation of retail services in the core retail area such as bookmakers, hair salons and internet cafes.
- 8.3.23 The Special Planning Control Scheme could also make recommendations regarding advertising structures and de-exempt all signage and advertising structures both internal and internal within the designated area and set out policies and objectives for the built environment and public realm.
- 8.3.24 The restriction of the ability of a retailer to change the use of a shop from one retailer to another also gives the Local Authority the power and discretion to permit uses for a temporary period of time. This may be appropriate for example where a shop unit has been vacant for some time, and rather than it becoming used by a non prime retail use on a long term lease, the de-exemption clause would allow the planning authorities to restrict such a use for a temporary period e.g. 3 years, pending the improvement of the retail market.
- 8.3.25 The primary purpose of the scheme is to highlight the importance of specific existing uses that are key components in the established character of the area and that act as magnets to the City and to control and prevent undesirable uses that may detract from these existing uses and character of the retail streets.

Cycling Facilities

- 8.3.26 Cycling accessibility and facilities in the City Centre are limited. Whilst specific bicycle parking is provided on St. Patrick's Street, further facilities should be provided on the ancillary shopping streets. The Council should promote further measures to encourage cycling in the City including dedicated cycle paths and parking facilities.
- 8.3.27 The City Council should support the introduction of a Cork Bike scheme. It is understood that the NTA are currently investigating the potential roll out of such a scheme in the

principle cities. The introduction of such a scheme in Cork City Centre would further improve accessibility and lessen reliance on the car to access the City Centre.

Parking and Accessibility

8.3.28 While car parking is generally well provided for within the City Centre, directional signage to these facilities and digital information signs regarding availability of parking could be improved. Whilst digital parking information signs were noted on the approach roads to the City, these were not operational. The Council should investigate means to improve directional and information signage in the City, particularly on the approach roads.

8.3.29 The absence of on-street meters is a significant drawback as visitors generally do not know where to go to buy discs and will not know how this system works. The restricting of parking to one hour on some city centre streets is a significant deterrent to visitors to the city centre who may wish to spend a longer period shopping or availing of other services in the city centre. For example, it encourages those attending business meetings to leave the City Centre immediately after their meeting rather than visiting shops, cafes etc. in the City Centre. In this regard, the Council should consider extending on street parking hours.

Development of Specific Derelict and Obsolete Sites

8.3.30 While the retail profile of the City Centre has improved significantly in recent years with the introduction of schemes such as Opera Lane, there are however, a number of key sites in the City Centre area that have the potential to contribute significantly to the further enhancement and development of the City's retail role and function. A number of these sites have been identified as potential opportunity sites and are discussed further in Appendix 4.

8.3.31 It is acknowledged however, that due to current market factors, the development of these sites may not be feasible in the short and indeed medium term. In this regard the Council should ensure that these sites, some of which are derelict and obsolete, do not continue to further decline and detract from the City Centre. The Council should prepare a co-ordinated programme for building maintenance and development which identifies specific buildings and sites that need to be targeted for improvement immediately. The Council should carry out regular inspections of the City Centre identifying sites in need of renewal and redevelopment on an ongoing basis and should promote the use of temporary measures such as appropriate hoarding, murals etc to improve the appearance of such sites on a short term basis. Derelict sites legislation should be used where appropriate.

8.3.32 In certain instances, the use of CPO powers may be necessary in order to develop key derelict sites and/or to assist in the site assembly of strategic sites in the City core.

Strategic Guidance on Key City Centre Sites

8.3.33 As a pilot study, Cork City Council should prepare a strategy for the future development of key City Centre sites.

8.3.34 This strategy document would identify sites that are available and suitable for retail development and set out a preliminary framework and guidelines for their future development.

8.3.35 Specifically the document would identify such issues such as:

- Site location and description.
- Land ownership pattern.
- Archaeological/heritage considerations.
- Access and parking.
- Provisional 3D massing and block plans clearly indicating the sites development potential.

8.3.36 Essentially the objective is to “package” the sites for potential retailers interested in locating in the City. The document should be proactive and ensure that commercial realities are considered. The document in particular should consider the floorplate, parking and delivery requirements of retailers. The council should promote site assembly where required in order to facilitate development, particularly where there are multiple site owners.

8.3.37 The report could also include other key marketing information to potential retailers including data on pedestrian flows, population profile, retail spend, commercial rates etc.

City Centre Ambassadors

8.3.38 It was noted during the health check assessment that the City Council employs City Centre ambassadors who provide information to tourists and visitors to the City. It is recommended that the City Centre ambassadors should wear a distinctive and identifiable uniform. The Council should also investigate the feasibility of establishing specific information booths at key locations within the retail core.

Wi-Fi Zones

8.3.39 The Council should promote the development of free wifi zones in the City Centre.

8.4 Key Recommendations for the Metropolitan Towns

8.4.1 The retail hierarchy set out within Chapter 7 of the Retail Study categorises existing Metropolitan Towns as either Large Metropolitan Towns or Small Metropolitan Towns. Midleton, Ballincollig, Carrigaline and Cobh are classified as Large Metropolitan Towns and smaller settlements such as Carrigtwohill, Passage West, Glanmire, Blarney and the proposed centre at Monard are designated as Small Metropolitan Towns.

8.4.2 The classification of the Metropolitan Towns within the retail hierarchy as either Large or Small Metropolitan Town reflects the existing role and function of these centres within the Metropolitan Area. Large Metropolitan Towns such as Midleton and Ballincollig currently serve wide catchment areas as evidenced from the results of the household survey undertaken to inform the retail study. There is potential for Carrigtwohill to grow from Small Metropolitan Town to a Large Metropolitan Town in line with planned population growth

given its location on the suburban rail corridor. Future retail development in Monard should be provided in conjunction with and at a scale appropriate to serve its future population.

- 8.4.3 Specific guidance for each of the Metropolitan towns is provided in Appendix 6 of this report.

8.5 Key Recommendations for District Centres

- 8.5.1 The key suburban district centres are Mahon, Douglas and Wilton District Centres on the south side, and Blackpool and Ballyvolane District Centres on the north side. Hollyhill is considered to have potential to develop to a district centre over the lifetime of the study. This study, in accordance with the City Development Plan, envisages these centres evolving from purpose built shopping centres into mixed use urban centres with a broad range of retail and non retail service functions, good public transport access and high quality urban design. Detailed guidance on the appropriate form of development for the five designated district centres is provided in the Development Plan and / or Local Area Plans / Action Area Plans. Where a local planning framework is not in place such as for Mahon and Ballyvolane the Planning authorities should consider the preparation of one.

- 8.5.2 The traffic and transport impact of new mixed use development in the district centres will need to be carefully considered by the Planning Authorities and any significant increase in the floorspace in district centres should be complemented by improvements in public transport infrastructure.

- 8.5.3 Specific guidance for each of the District Centres is provided in Appendix 6 of this report.

8.6 Key Recommendations for Neighbourhood Centres

- 8.6.1 There is a good spatial distribution of neighbourhood centres in suburban Cork. A number of centres contain a good mix of retail, retail service and other commercial uses. However, some centres consist of standalone supermarkets. A broad range of uses should be encouraged in each neighbourhood centre in accordance with the definition provided in Annex 1 of the Retail Planning Guidelines 2012, which reads as follows:

“Local Centre or Neighbourhood Centre

Comprise a small group of shops, typically comprising newsagent, small supermarket / general grocery store, sub-post office and other small shops of a local nature serving, a small, localised catchment population”.

- 8.6.2 The Planning Authorities should facilitate small scale expansion of existing neighbourhood centres where the uses and scale of development proposed is consistent with a neighbourhood centre. The Planning Authorities should prevent change of use of local shops to non-retail use by including suitable policies in the development plan.

8.6.3 The Planning Authorities may need to consider the designation of new neighbourhood centres or expanding existing neighbourhood centres during the preparation of the new Development Plans where significant additional population growth is planned.

8.7 Key Recommendations for Retail Warehousing Development

8.7.1 There are a number of locations in the Cork Metropolitan Area with ad hoc retail warehousing units, the most obvious being the Kinsale Road and Tramore Road areas. These locations often include an ad hoc and excessive level of signage and poor quality urban environment.

8.7.2 It is recommended that the Planning Authority consider carrying out a targeted review of the various locations mentioned in Chapter 5 to ascertain any breaches of planning control which may exist in relation to uses and signage. In addition they should engage with landowners in terms upgrading the public realm in these areas, particularly in terms of improvements in landscaping and signage.

8.7.3 Planning authorities should closely monitor compliance with existing permissions for retail warehouses to ensure that the goods being sold are consistent with the definition of bulky goods in order to promote and protect and vitality and viability of city and town centres.

8.7.4 The location for future retail warehouse development should be in accordance with the guidance set out in Section 7 of this report. The preferred location for future retail warehouse development will be level 2 centres in the retail hierarchy. There should be presumption against the development or change of use of existing premises within industrial or business parks to retail warehouse use.

8.7.5 It is noted in that it is stated in the guidelines that an innovative type large-scale retail warehouse development in excess of the 6,000 sq. metre cap may be considered on the merits of individual development applications in the five NSS Gateway cities including Cork. Subject to the criteria set out in the guidelines the development of a flagship retail warehouse operator in Cork Gateway would be appropriate. Given the capacity for additional retail floorspace identified within the retail study it is considered that there is potential for the development of such an operator within the Metropolitan Area. The location of such a development should be well served by existing or planned public transport services and it must be demonstrated that such a proposal would not adversely affect the efficiency of the national road network. An application for such a development must be accompanied by a detailed traffic impact assessment and should also include a retail impact assessment which in particular considers the vitality and viability of city/town centres and demonstrate that the development would not include uses and activities which are more appropriate to city and town centre location.

CHAPTER 9: CRITERIA FOR ASSESSING FUTURE RETAIL DEVELOPMENT

9.1 Introduction

9.1.1 The principal aim of this chapter is to provide policy recommendations regarding the assessment of future planning applications for retail development.

9.2 Criteria for Assessing Future Retail Development

9.2.1 All applications for significant retail development should be assessed against a range of criteria. These criteria are set out below. It should be noted that it is not appropriate to assess all applications for new retail development against all the criteria, particularly developments which are clearly in accordance with strategy in Chapter 7.

The Sequential Test

9.2.2 It is stated in the 2012 Retail Planning Guidelines:

“Sequential development means that:

The overall preferred location for new retail development is within city and town centres. Retail development may also be appropriate within District Centres identified in the settlement hierarchy at a scale appropriate to the needs of the area and

Subject to the requirements below, only where the applicant can demonstrate, and the planning authority is satisfied that there are no sites or potential sites within a city, town centre or designated district centres should an edge of centre site be considered. In addition, only in exceptional circumstances where it can be demonstrated that there are no sites or potential sites available either within the centre or on the edge of these centres should an out of centre site be considered.”

9.2.3 The Guidelines note that the order of priority for the sequential test is to seek to locate retail development in the city/town/district centre. Only where it can be demonstrated that there are no sites which are (a) suitable (b) available and (c) viable should an edge of centre or out of centre site be considered.

9.2.4 The suitability of a site refers to such matters as the sites zoning, current land use activity, the size of the site and its capacity to accommodate the development and traffic and transportation issues. Availability refers to issues such as site ownership, ease of assembly and timing of delivery. It is noted in the Guidelines that sites must be genuinely available for development at the time that site acquisition/assembly begins and development must be deliverable within a reasonable time frame. Viability refers to matters such as the financial viability of a development and the cost of site acquisition. Excessive development costs relative to values are also a consideration.

9.2.5 The Guidelines also note:

“The application of the sequential approach requires flexibility and realism on the part of both retail developers and planning authorities, to ensure that the various forms of retailing are developed in the most appropriate locations.”

9.2.6 All applications for retail developments should be subject to the sequential test. The criteria noted above (i.e. suitability, availability and viability) must be considered in the assessment of such sites. Consideration should be given to existing vacant properties and extant permissions when preparing the sequential test. The planning authority should also have regard to the format and scale of the retail development proposed when applying the sequential test approach.

Retail Impact Statements

9.2.7 Retail Impact Assessments shall be prepared in accordance with the current Retail Planning Guidelines and its associated Annex. The Guidelines require an applicant to address the following criteria and demonstrate whether or not the proposal would:

- Support the long term strategy for city/town/district centres as established in the retail study/development plan and not materially diminish the prospect of attracting private sector investment into one or more town centres;
- Have potential to increase employment opportunities and promote economic regeneration;
- Have the potential to increase competition within the area and thereby attract further consumers to the area;
- Respond to consumer demand for its retail offering and not diminish the range of activities and services that an urban centre can support;
- Cause an adverse impact on one or more city/town/district centres, either singularly or cumulatively with recent developments or other outstanding planning permissions (which have a realistic prospect of implementation) sufficient to undermine the quality of the centre, or its wider function in the promotion and encouragement of the arts, culture, leisure, public realm function of the city/town/district centre critical to the economic and social life of the community;
- Cause an increase in the number of vacant properties in the primary retail area that is likely to persist in the long term;
- Ensure a high standard of access both by public transport, foot, private car so that the proposal is easily accessible by all sections of society;
- Link effectively with an existing city/town/district centre so that there is likely to be commercial synergy;

9.2.8 Other criteria that should be considered in the assessment of significant applications include:

- That there is a quantitative and qualitative need for the development.
- An assessment of existing “pipeline” floorspace which may exist within a particular

centre.

- An assessment of the quality, location and suitability of the existing vacant floorspace having regard to existing unimplemented permission and the extent of vacant floorspace.
- The contribution of the development towards the improvement of the city/town/district centre in terms of urban design.
- The contribution of the development towards site or area regeneration.
- The role of the development in improving the competitiveness of the centre against other competing centres.
- Compliance with development plan policies and objectives.
- The development is easily accessible by the elderly and disabled/mobility impaired.

9.2.9

When proposing a retail development in any centre in the Metropolitan Area the applicant will be required to demonstrate the following in the Retail Impact Assessment

- That the floorspace proposed is appropriate having regard to the quantum and location of floorspace required in that centre.
- That the Retail Impact Assessment has been based on an appropriate catchment area.
- That the RIS has taken account of extant permissions and their likelihood of being implemented.
- That the RIS has considered the extent and nature of existing vacant floorspace and its suitability for the type and scale of retail facility proposed.

The quantitative need for the quantum of floorspace will not be the only deciding factor; the Council will also consider whether any given planning application will be better located sequentially than permitted developments or whether it would be required for qualitative reasons such as strengthening the retail profile of a particular centre in accordance with its role within the retail hierarchy.

9.3 Criteria for Assessing Particular Types of Development

9.3.1 This section sets out the criteria for assessing planning applications for different types of retail development.

Convenience Food Shopping

9.3.2 Where practicable, new convenience retail development should be located within the city/town centre or within a designated neighbourhood or district centre serving a large residential community. Accessibility is key to the success of such developments and such proposals should be accessible by all modes of transport including pedestrians and public transport. As large convenience shops attract customers carrying out large weekly shopping, it is important that such development should also be served by adequate car parking.

9.3.3 Edge of centre locations for such developments may be appropriate where there is limited room for expansion within an existing city/town/district centre. Many urban centres due to their historic layout, land use patterns and site ownership have a lack of sites suitable to accommodate the larger format convenience operators. This is acknowledged in both the Retail Planning Guidelines (2012) which state:

“In certain limited circumstances however, it may not be possible to bring forward suitable sites on or on the edge of a city or town centre because of the site requirements of large convenience goods stores, heritage constraints in historic towns, or because the road network does not have the capacity to accommodate additional traffic and service vehicles. In these cases, the sequential approach should be used to find the most preferable sites.”

9.3.4 Nonetheless, out of centre sites for this type of retail development require careful assessment in terms of their potential impact on nearby centres and will be subject to compliance with the sequential test.

9.3.5 The Retail Planning Guidelines impose new caps regarding the maximum size of supermarkets. The maximum size of supermarkets in Cork City 3,500 square metres net sales.

9.3.6 Where a proposal for a large convenience store involves a significant amount of comparison goods, the application drawings should clearly delineate the floor area to be devoted primarily for the sale of convenience goods. A detailed assessment of the comparison element of such proposals should be undertaken including a full quantitative assessment of the potential impact of that element on existing comparison goods stores within the catchment area.

9.3.7 In areas planned for residential expansion, the development of a neighbourhood centre anchored by a convenience supermarket (with a floor area not exceeding 1,500 sq. metres net) is prudent. Modest convenience stores may also be appropriate in large industrial / employment zones where they anchor a neighbourhood centre serving the daily shopping needs of workers and employees.

9.3.8 The Guidelines note that no distinction is being made in the Guidelines between retailers based on their pricing policies and discount foodstore is no longer stated as a distinct retail type.

District Centres/Shopping Centres

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

- 9.3.10 There are five designated district centres in Cork namely Mahon, Blackpool, Wilton, Douglas and Ballyvolane. There is an extant permission relating to the Wilton Shopping Centre for its substantial redevelopment which has not been implemented. The different district centres offer a different range of services and facilities. Mahon has developed into a primarily comparison shopping destination and has a broader range of high order comparison retailing than would normally be found at a District Centre. It however, lacks the range of retail services and community and cultural facilities that the guidelines promote in such centres. Blackpool and Wilton both offer a good range of convenience, comparison and retail services to meet the day to day shopping needs of their local catchment. Both centres however, would benefit from further regeneration, environmental improvements and consolidation of their retail role and function. Douglas also has a good range of retail facilities and is particularly important as a convenience food retail destination. The centre however, would again benefit from further consolidation and enhanced linkages and permeability. Ballyvolane whilst a designated district centre, does not have the range of retail floorspace and facilities associated with such centres and is dominated by one large anchor store.
- 9.3.11 The future development of the district centres in the City should generally be in accordance with the floorspace requirements set out in Chapter 7. However, any future expansion of these centres should be coupled with measures to ensure that these centres evolve into fully functioning district centres with a high quality urban environment, greater accessibility, permeability, traffic management, urban realm improvements, animation and a wider mix of land uses. The allocation of additional floorspace in line with the floorspace distribution set out in Chapter 7 to such centres will be dependent on the delivery of overall improvements and enhancement to the district centre. The growth of such centres should however, be carefully managed to ensure that they retain their role as primarily destinations for the day to day shopping needs of a local catchment. District Centres should not evolve into becoming a retail destination in their own right.
- 9.3.12 Proposals to modify existing extant retail permissions in the existing district centres to more commercially viable developments should be considered favourably by the Council.

Retail Warehouse Parks

- 9.3.13 It is recognised in the Retail Planning Guidelines that in general retail warehouses do not fit easily into town centres given their size requirements and the need for good car parking facilities. It is therefore appropriate to group these facilities into planned retail parks on the edge of the town centre if such sites area available or in an out of centre site, if the applicant can demonstrate that there are no suitable edge of centre sites available. Criteria for assessing retail warehouse applications include scale and design of the development, appropriate vehicular access and the quantitative need for such development.
- 9.3.14 It is noted in the Retail Planning Guidelines that because the number of retail parks has grown substantially over the past decade, they are reaching saturation point in some areas. It is noted that this has lead to vacancy in some cases. There are notable vacancies in some of the planned retail parks in Cork, particularly at the East Gate Retail Park.

- 9.3.15 It is noted in the Guidelines that that there should in general, be a presumption against further development of out of town retail parks. Any application for further development should be considered carefully in the context of the existing level of provision.
- 9.3.16 The floorspace survey undertaken to inform the retail study has identified a number of instances throughout the Metropolitan Area where main stream convenience and comparison retail floorspace has developed within retail warehouse parks. Such uses have also extended to industrial and business parks throughout the Metropolitan Area. There should be a presumption against the development of bulky household floorspace in such industrial/business parks. Applications for change of use of existing light industrial/business park units to retail warehouse use should be discouraged by the council and such development directed to appropriate designated areas.
- 9.3.17 It is also noted that the development of convenience and comparison floorspace at these locations can potentially impact on the overall vitality and viability of core retail areas. In this regard the range of goods sold in existing or planned parks should be restricted to bulky goods as defined in Annex 1 of the Retail Planning Guidelines 2012. These include carpets, furniture (including flat pack furniture), household appliances, bulky DIY items, tools and equipment for the house and garden, bulky pet products, catalogue shops, bulky nursery furniture, audio visual, photographic and information processing equipment and goods which are such a size that they would normally be taken away by car and not be manageable by customers travelling by foot, cycle or bus, or that require large floor areas to display them. As noted in the Guidelines it is acceptable that up to 20% of such units be used for the sale of ancillary products associated with an otherwise bulky good. Such space is to be clearly delineated on planning application drawings to facilitate future monitoring and enforcement.
- 9.3.18 As stated in the Retail Planning Guidelines, individual retail units should not be less than 700 sq. metres and not more than 6,000 sq. metres (including any ancillary garden centre) in size.
- 9.3.19 It is noted in that it is stated in the guidelines that innovative types of large scale retail warehouses in excess of the 6,000 sq. metre cap may be considered on the merits of individual development applications in the five NSS Gateway cities including Cork. Subject to the criteria set out in the guidelines the development of a flagship retail warehouse operator in the Cork Gateway would be appropriate. The location of such a development should be well served by existing or planned public transport services and it must be demonstrated that such a proposal would not adversely affect the efficiency of the national road network. An application for such a development must be accompanied by a detailed traffic impact assessment and should also include a retail impact assessment which in particular considers the vitality and viability of city/town centres and demonstrate that the development would not include uses and activities which are more appropriate to city and town centre location.

Outlet Centres

- 9.3.20 The 2012 Retail Planning Guidelines define outlet centres as *“groups of stores retailing end-of-season or discounted items at discounted prices and are typically located in out of centre*

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.

- 9.3.21 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.

Local Shops and Petrol Filling Stations

- 9.3.22 Local shops play an important role in providing for daily top up shopping. They are also often easily accessible to the elderly and disabled. The development of such local shops should be encouraged in large residential areas around the principal towns in the County. Such developments should be designed to a high standard and be easily accessible to all members of society.
- 9.3.23 As stated in the Retail Planning Guidelines, the size of retail units associated with petrol filling stations should not exceed 100 sq metres. Where permission is sought for a shop associated with a filling station with floorspace in excess of 100 sq. metres, the sequential approach to retail development shall apply.

Retailing in Small Towns, Villages and Local Centres

- 9.3.24 Small towns, villages and local centres in urban areas play an important role in the lives of the communities that they serve and provide valuable day to day retail facilities and services to their communities. Development in such villages and small towns should be focussed in the core village/town centre area and should complement existing retail provision. Such development in urban areas should be appropriately located to ensure maximum accessibility for the local communities to which they serve, particularly by foot.
- 9.3.25 The key objective is to provide and retain a range of retail facilities and services to serve the day to day needs of the local centre/village/small town's catchment area. The scale of such provision should however, be cognisant of the retail role and function of such centres within the retail hierarchy.

Retailing in Rural Areas

9.3.26 Retailing in the rural areas of the metropolitan area should be directed towards existing settlements. There are however some circumstances where retail development in a rural area may be appropriate. These include:

- A retail unit which is ancillary to activities arising from farm diversification
- A retail unit designed to serve a tourist or recreational facility, ancillary to the main use
- A retail unit attached to a craft workshop
- A small scale retail unit (not in excess of 100 sq. metres gross) designed to serve a dispersed rural community

Such proposals should be considered on their merits in accordance with the proper planning and sustainable development of the area.

Casual Trading

9.3.27 Casual trading, including farmers markets, can make a valuable contribution to the local economy and contribute to the vitality and viability of a retail centre. Such activities should be properly regulated as per the provisions of the Casual Trading Act 1995 and consideration should be given to the quality of offer of such casual trading.

CHAPTER 10: MONITORING

10.1 Introduction

10.1.1 This chapter set out a monitoring programme for the baseline data used to inform the retail study. It sets out recommendations on the indicators to be assessed over the lifetime of the retail study in order to ensure that baseline information is kept up to date and ensure that the study remains relevant and takes account of the changing retail context in the Metropolitan area.

10.2 Floorspace Study

10.2.1 A detailed floorspace study has been undertaken to inform the retail study. This includes a record of all retail floorspace within the Metropolitan Area. The floorspace study is categorised by location and classification i.e. convenience, comparison and bulky household floorspace.

10.2.2 It is recommended that the floorspace survey is reviewed on an annual basis to ensure that it is kept up to date. The optimal way to achieve this is to keep a detailed record of all planning permissions relating to retail development, including those that relate to a change of use. A record of commencement notices should be maintained in order to determine what permissions are being implemented. The floorspace data is also recorded on a GIS database, which will facilitate easy identification of relevant units. The base data base should be updated noting any changes of use or any additional new retail floorspace.

10.2.3 It will be important to also monitor and keep a record of extant retail permissions and any applications for extension of duration of such permissions. If any of these permissions are implemented, these should also be recorded on the floorspace data base.

10.2.4 It is recommended that once every three years that a more comprehensive review of the baseline floorspace survey is undertaken. This would involve on site checking of all retail premises noted on the data base to determine whether there have been any changes of use/closure etc. Not only is such an analysis important in maintaining a complete and up to date database of retail properties but it also allows for an analysis of how trading patterns may have changed over time. For example it may indicate the loss of multiples from a particular area and a greater emergence of independents. Such information can assist in analysing how a centre is performing over time in light of increasing competition, changes in planning policy, emergence of new retail formats and also can help identify any gaps in retail provision.

Vacancy Rates

10.2.5 The floorspace survey also includes an analysis of the rates of vacancy within all centres in the metropolitan area. Vacancies within the core retail areas have also been mapped and identified within the retail study. It will be important to carry out an annual review of the extent of vacancy within the core retail areas to determine whether vacancy rates are

decreasing or increasing and determine where issues of long term vacancies exist. Vacancy should be mapped within the core retail areas.

Health Checks

10.2.6 A detailed health check has been undertaken for Cork City and the Metropolitan Towns of Carrigaline, Carrigtwohill, Midleton, Cobh, Passage West, Blarney, Glanmire, Ballincollig as well as the District Centres of Mahon, Blackpool, Wilton, Douglas and Ballyvollane.

10.2.7 Key indicators utilised in the assessment include:

- Attractions
- Accessibility
- Environmental Quality/Amenity
- Diversity of Uses
- Multiple Representation
- Levels of Vacancy

10.2.8 It is recommended that the health check for each centre is reviewed every two years to determine whether there has been any material change in any of the above indicators. Such an analysis on an annual basis allows for a time series database to allow comparison of centres based on an established set of criteria over time.

Quantitative Assessment

10.2.9 The Quantitative Assessment has been prepared on the basis of current economic data and predicted changes in population and economic growth. Projections have been based on the best available information and in accordance with best practice.

10.2.10 However, the retail sector is a dynamic one that is constantly evolving. Similarly population forecasts and predicted growth rates in economic growth are subject to change.

10.2.11 In this regard it will be important to monitor how the study is performing in terms of the delivery of future floorspace requirements and also whether the base line assumptions which underline the study are following trend. In this context it is recommended that the following factors are monitored on an annual basis:

Population Growth

10.2.12 The population projections are based on those set out in the Regional Planning Guidelines for the South West Region and are in accordance with the City and County Council's core strategy documents. It is recommended that population projections adopted in the study are reviewed regularly to ensure that the target set out are being achieved. Any future revisions to population targets issued by the Regional Authority should be incorporated into the study.

Expenditure Growth

- 10.2.13 Expenditure per person is also utilised in determining future floorspace requirements. It is recommended that the Annual Services Enquiry (published every two years) and the Retail Sales Index is reviewed to ensure that expenditure levels follow those set out in the current study.

Internet Sales

- 10.2.14 The household survey undertaken to inform this retail study included specific questions on the internet sales within Cork. Only a small percentage of respondents noted that they carry out their main comparison 0.8% and bulky goods 0.2% shopping on line. It should be noted however, that expenditure on internet retailing has the potential to significantly increase over the forthcoming years. It is an emerging trend and is likely to continue to become a more popular form of retailing as technologies improve and retailers embrace and promote this retail format. In this regard, it is recommended that expenditure data is regularly reviewed and adjusted over the life time of the study to account for any notable increase documented by the CSO or other verifiable source in terms of internet sales expenditure and that the implications for retail floorspace requirements are monitored. It is recognised that there may not be a direct link between increase in internet retailing and retailers floorspace requirements.

Commercial Indicators of Vitality and Viability

- 10.2.14 Other indicators can be used to determine how centres are functioning in terms of their vitality and viability. In this regard it is recommended that Cork City Council and Cork County Council commence a time series database with information on rental levels and yields for key urban centres in the study area. This would allow a comparison between centres over time.
- 10.2.15 It would also be beneficial to have data on pedestrian movements for the City Centre. This information is of use to potential retailers who require information on potential footfall. In this regard annual pedestrian counts on the principle shopping streets in the City is desirable.

