County Development Plan Review

Retail

Part A: Non-Metropolitan Retail Background Paper

November 2012

Planning Policy Unit
Cork County Council

Retail in Non-Metropolitan Towns and Town Centres – Section 11 Background Paper

These background papers set out some of the factual, contextual information and sets out some of the issues in relation to both town centres and retailing which have been used to inform the Section 11 Consultation Document and forms part of the process of preparing the forthcoming Draft County Development Plan.

The background papers are composed primarily of 2 parts:

Part A – Non-Metropolitan Retail Background Paper – This document is primarily composed of an assessment of the key facts and figures (where available) and some suggestions in relation to the approach to retail in non-metropolitan Cork. The Metropolitan area (Cork City, Suburbs and Metropolitan Towns) has been excluded at this stage and is the subject of the Cork Joint Retail Study currently being prepared by the Consultants John Spain and Associates as is a requirement of the Retail Planning Guidelines (2012). This will inform the preparation of the Draft County Development Plan in due course.

Part B – Town Centre Review (Volumes 1 & 2) - This is the full review and report on 12 Town Centres in the County prepared which was presented to Planning Policy Group in May 2012. It remains in Draft format. The towns studied were chosen generally based on their size of population (> 5000) and their representative geographical spread. The individual surveys looked in detail at two key Town Centre Health Check Indicators (also known as Vitality and Viability Indicators) i.e. Diversity of use and Vacancy while it also gave some consideration to other issues.

Note: Although November 2012 is the cover date on this document the data used to inform the document was largely collected in late 2011 and throughout 2012 as indicated above.

Part A – Non Metropolitan Retail (Background Paper)

1.0 Introduction and Context

The purpose of part A of this background paper is to set out some of the facts, contextual information and issues in relation to retail particularly where it applies to the metropolitan towns.

In April 2012 a revised set of Retail Planning Guidelines were introduced by the Department of the Environment. These Guidelines outline 5 key policy objectives which must guide planning authorities in addressing retail development issues in their development planning and management functions, 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; and
- Delivering quality urban design outcomes

The guidelines are very much about refocusing towards plan led development, encouraging competitiveness and in particular promoting the viability and vitality of town centres.

1.1 City and Metropolitan Area Retail Requirements

The Metropolitan area (Cork City, suburbs and Metropolitan Towns) is subject of the Cork Joint Retail Study currently being prepared by the Consultants John Spain and Associates as is a requirement of the Retail Planning Guidelines (2012) and will inform the preparation of the Draft County Development Plan in due course.

1.2 Non-metropolitan Retail Requirements

Section 3.7 of the Retail Planning Guidelines outlines the requirements of Development Plans outside the Joint or Multi-Authority Retail Strategies. The Guidelines state that these areas should include more general statements of policy in line with the following points (derived from Section 3.3):

- State elements of the settlement hierarchy as outlined in core strategy
- Outline level and form of retailing appropriate in settlements
- Define, with map, the boundaries of core shopping areas
- Strategic guidance on location and scale, where appropriate identifying opportunity sites and identifying sites to accommodate needs
- Include objectives to support action initiatives e.g. mobility management measures and public realm interventions.
- Identify relevant development management criteria.

In relation to the level and form of retailing the Guidelines note that it is sufficient to state the general retail function of the settlement and note additional retail development requirements, reflecting the local evidence of market interest and the need to provide good opportunities for retail provision to serve the main population centres in the county e.g. such a statement might indicate that there is a need for an improvement of the convenience retail offer in a particular town or district centre or that there is a need to enhance the higher order comparison offer of another town.

1.3 Information gathered in relation to Non-Metropolitan Retail

Much of the information gathered in this paper has focused around the collection of facts (where available) in relation to the 18 non-metropolitan towns. In particular the Town Centre Study 2012 carried out by the PPU and the Census 2011 provided the bulk of the most up to date information. The following are the primary areas where information has been gathered to date:

- Establishing Retail Typology and Suggested Retail Hierarchy
- 2011 drive-time population catchments at 15 and 30 minutes
- 2007 retail figures (net)
- 2012 retail figures (gross) (8 towns only)
- Convenience retailer presence
- Extant retail permissions and planning interest.
- Sample approach to individual towns

The Draft Town Centre Study 2012 presented in May (a separate background document) has outlined some of the issues prevalent in the surveyed town centres from vacancy problems to necessary public realm improvements. It has also sought to define and confirm the boundaries of core shopping areas, identify opportunity sites, etc.

2.0 Examining the Retailing and Settlement Hierarchy

The Retail Planning Guidelines require that a hierarchy is established in line with the settlement hierarchy outlining the level and form of retailing appropriate for the County. The Retail Planning Guidelines suggest a number of tiers and outline an indicative hierarchy in Section 2 *Retail Policy Context* while noting that specific functions provided by each tier may overlap in many respects. In the context of County Cork it is considered that the following typology is in evidence.

Table 1 - Retail Typology for County Cork
Metropolitan:
Includes: Cork City and Metropolitan Towns
Regional:
The Retail Planning Guidelines recognise this as a tier which includes hub towns (designated under the National Spatial Strategy) and other towns which perform important regional retailing functions. Mallow is included as such a hub town particularly based on its significant population growth target to 2022. Clonakilty could also be considered as it has a regional function within the west of the County. Includes: Mallow and Clonakilty
Sub-Regional:
These are considered to be towns which perform important sub-regional retailing functions often including the major national retailing chains. In the case of County Cork these can be split into 2 categories:
a) Larger County & Ring Towns:
These are Larger County & Ring Towns which generally perform important sub-regional retailing functions and include some of the major national retailing chains, particularly convenience. In general these have a population in excess of 5,000 or are designated as Ring Towns in consecutive plans. Includes: Bandon, Fermoy, Youghal, Macroom and Kinsale
b) Small to Medium County Towns:
These are Small to Medium County Towns which generally perform important sub-regional retailing functions and include some of the major national retailing chains, particularly convenience. In general these have a population in the region of 1500 to 5000. Includes: Charleville, Kanturk, Millstreet, Mitchelstown, Bantry, Dunmanway and Skibbereen.
Smaller County Towns:
Generally these are smaller towns often of less than 1500 population. In general they provide basic convenience shopping, either in small supermarkets or convenience shops and in some cases, also provide comparison shopping e.g. small-scale hardware, retail pharmacies and clothes shops. Includes: Buttevant, Newmarket, Castletownbere and Schull.
Villages, Neighbourhood Stores and Rural Areas:
These are composed of smaller settlements which provide basic convenience shopping and in some cases also provide comparison shopping e.g. small-scale hardware, retail pharmacies and clothes shops.

2.1 Proposed Retail Tiers for Non-Metropolitan Towns

While the typology outlined is in general in line with the Retail Planning Guidelines it is considered that there are effectively 3 tiers appropriate for retail centres in non-metropolitan Cork. Excluding metropolitan Cork, the settlements have been examined and are represented based on their population size, catchments, geography, existing floorspace supply and demand.

The first tier proposes to include two of the stronger settlement and service centres with a regional role. Outside the city and metropolitan area, Mallow in the North and Clonakilty in the West continue to remain the centres where it appears most logical to direct the bulk of higher order uses. The approach to designating these two towns as higher order tiers remains in line with the Retail Hierarchy suggested in Chapter 5 of the current County Development Plan 2009. The overall strategy for Mallow in the County Development Plan is *'expansion in line with hub town status to provide large floor plates to attract more premium occupiers. Should be developed as one of the largest towns in the County.'* The strategy for Clonakilty is *'expansion to become the main retail centre in West Cork'*. If this approach continues to be adopted then Clonakilty and Mallow are the most appropriate locations for continued expansion of retail development.

In the case of Mallow, while there are a number of towns within its geographical hinterland which could be considered as attractive alternative locations for significant retail expansion it is suggested that the designation of Mallow as a National Spatial Strategy hub town and its strong presence as a retail centre determine it as the most suitable location in the northern part of the county for significant retail expansion.

Clonakilty's inclusion as a Tier 1 town is merited on the basis that it already has a strong provision of both convenience and comparison floorspace in the West of the County, being the largest and most dynamic town in this area with a strong touristic function. Towns such as Bandon and Kinsale also merited consideration but due to their closer proximity to the metropolitan area and likelihood to be impacted by the city's influence were discounted. It was considered that Clonakilty was in effect the most central, established location within the West Cork area.

Tier 2 generally includes the Ring Towns and some of the larger population centres within the North, West and CASP while Tier 3 includes the smaller population centres within the North and West SPA many of which have a population of less than 1500. Map 1 and Table 2 in this document outline the suggested tiers.

2.3 Principles for Proposed Retail Tiers

Different principles have been suggested for the different tiers proposed:

<u>Tier 1</u> towns have an important regional retail function particularly in relation to comparison retailing. They are also providers of important leisure and public services. Settlements should provide for convenience retail in line with the catchment. In general comparison retailing should have no upwardly limit provided the location is acceptable. Planned retail parks can be considered where justification is evident.

<u>Tier 2</u> generally includes the Ring Towns and some of the larger population centres within the North, West and CASP. In general these towns perform important sub-regional retailing functions and

often include a number of the major national retailing chains. They often have an important role in relation to the provision of leisure and public services. The settlements should provide for convenience and comparison retail in line with the catchment. A cautious approach should be applied in relation to out-of-centre proposals for retail warehousing.

Tier 3 includes the smaller population centres within the North and West SPA. Many of these towns have a population of less than 1500 and generally function at the catchment level but sometimes beyond where they may have a tourist function for instance. Such towns often have only one or two medium sized retail convenience operators with small-scale comparison retailing generally supporting the local catchment. The settlement should provide for convenience in line with the catchment and some comparison where appropriate. Generally these towns have a relatively small catchment population or catchments which are heavily influenced by close proximity of higher order towns e.g. Buttevant catchment is heavily impacted by Mallow, Charleville, Kanturk. A cautious approach should be applied in relation to out-of-centre proposals for retail warehousing.

Table 2 - Suggested Retail Network

Tier	Towns	Suggested Approach
Tier 1 – Includes the 2 Main Settlement centres which have a Regional Role within the North and West of the County.	Mallow, Clonakilty.	Convenience at level to support own catchment. Comparison should have no upper limit provided location is acceptable. Planned retail parks appropriate where justification is evident.
Tier 2 – Includes the Ring Towns and some of the larger settlement centres within the North, West and CASP.	Youghal, Bandon, Macroom, Mitchelstown, Charleville, Fermoy, Skibbereen, Bantry, Kanturk, Kinsale.	Convenience and Comparison to be provided which is in line with its catchment. Cautious approach to out-of-centre retail warehousing.
Tier 3 – Includes the smaller population centres within the North and West SPA which generally function at electoral area level.	Millstreet, Castletownbere, Dunmanway, Newmarket, Schull, Buttevant.	Primarily convenience with some comparison as appropriate. Cautious approach to out-of-centre retail warehousing.

2.4 Retailing in the Strategic Areas

Set within the context of their strategic planning areas the proposed tiers are described as follows:

CASP

In the CASP Ring towns, Mallow as a designated hub town under the National Spatial Strategy has an expanding regional function in terms of retailing and already a substantial supply of floorspace. The other Ring Towns of Bandon, Fermoy, Youghal, Macroom and Kinsale have important sub-regional retailing functions based on their significant population and their catchments. Kinsale has a somewhat limited catchment due to its coastal location and its proximity to Cork City centre but has a strong and significant tourist function.

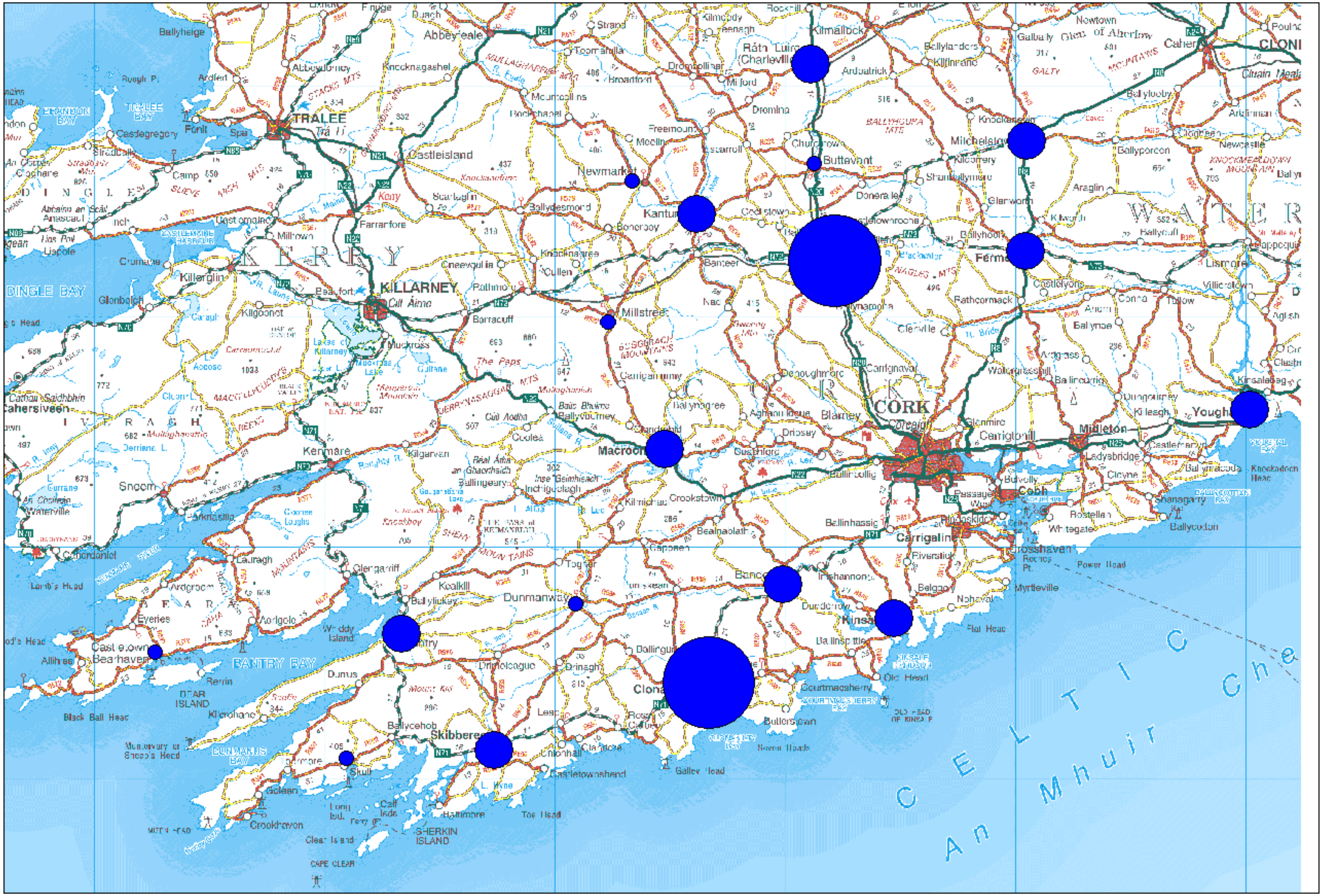
North Strategic Planning Area

The majority of the towns in the North SPA are Small to Medium County Towns ranging in population from 1500 to 5000 including Mitchelstown, Charleville, Kanturk and Millstreet. Mitchelstown and Charleville are the largest of these towns and serve catchments extending into County Tipperary and County Limerick and both have a strong sub-regional function. Kanturk and Millstreet also function importantly within their geographical area. There are also two smaller County Towns of population less than 1500 (Newmarket and Buttevant) which have somewhat more limited retail functions.

West Strategic Planning Area

The majority of the towns in the West SPA are Small to Medium County Towns ranging in population from 1500 to 5000 including Clonakilty, Bantry, Skibbereen and Dunmanway. Clonakilty is the largest town in the area and has a strong regional function in this Strategic Planning Area. It has a good supply of retail floorspace and has continued interest in expanding its retail supply. In addition to providing for the needs of the local population and hinterland Clonakilty also performs a significant tourism function. Bantry and Skibbereen are also significant population and service centres alongside Dunmanway which is centrally located within this sub region. There are also two smaller County Towns of population less than 1500 located along the western peninsulas (Castletownbere and Schull) which have limited retail functions. Bantry, alongside Skibbereen, is well positioned geographically to cater for higher order retailing requirements to serve the peninsulas.

Map 1 - Suggested Non Metropolitan Retail Network – Tiers 1 to 3 (Tier 1 largest to Tier 3 smallest)



3.0 Town Retail Analysis

The following sections contain the recorded information and analysis of the 18 Non-metropolitan settlements which has informed the suggested retail tiers proposed earlier in this paper. It is also envisaged that the information gathered will inform individual statements in relation to towns regarding the level and form of appropriate retailing as is a requirement of the Retail Planning Guidelines. An example of information gathered is included in Appendix B.

It includes information in relation to population and catchments, retail floorspace figures from 2007 and 2012 estimates (where available), retailer presence, outstanding or planned planning commitments.

3.1 Town Population and Catchments

Table 3 sets out the Census 2011 population, 15 and 30 minute potential population catchments for each of the non-metropolitan towns. The Census 2011 potential population catchment figures were kindly provided by AIRO (All Ireland Research Observatory) who operate from National University of Ireland, Maynooth. Figures are also available on a 60 minute and 90 minute drive time (although not included in this table). Although many Retail Impact Assessments use a 20 minute drive time catchment it is considered that both the 15 minute and 30 minute indicators are useful in demonstrating the potential captive population for the town or retail centre within that particular driving distance. It allows a comparison to be made between the different settlements. The tables also include the typology as suggested earlier in this paper and the latest draft population target for the settlements to 2020.

The variable quantitative size of the catchments recorded demonstrate that some towns are relatively isolated. Those towns closest to the metropolitan area have the highest potential catchments and consequently face the biggest threats of leakage to the city and metropolitan area. Table 4 which lists the settlements within the 15 and 30 minute catchments of each town (Cork County only) shows that some towns may have a synergy due to their relatively close proximity while smaller towns with potentially large catchments are more heavily influenced by nearby higher order towns.

Table 3 – Population, Catchments and Suggested Hierarchy (Tiers) for Non-Metropolitan Towns

Town	2011 Population	15min catchment	30 min catchment	Suggested Tier	Typology	Draft Population Target 2022
CASP Ring Towns						
Mallow	11,605	28,088	161,211	Tier 1	Larger County & Ring Towns	20,000
Youghal	7,794	13,307	62,147	Tier 2	Larger County & Ring Towns	8,309
Bandon	6,640	19,959	202,566	Tier 2	Larger County & Ring Towns	7,379
Fermoy	6,489	27,666	207,971	Tier 2	Larger County & Ring Towns	7,442
Kinsale	4,893	13,914	202,431	Tier 2	Larger County & Ring Towns	7,247
Macroom	3,879	12,331	91,190	Tier 2	Larger County & Ring Towns	4,351
North SPA						
Mitchelstown	3,677	18,662	89,368	Tier 2	Small to Medium County Town	5,346
Charleville	3,672	16,717	96,635	Tier 2	Small to Medium County Town	4,925
Kanturk	2,263	12,164	62,529	Tier 2	Small to Medium County Town	2,400
Millstreet	1,574	7,302	44,106	Tier 3	Smaller County Town	1,756
Newmarket	988	8,658	49,454	Tier 3	Smaller County Town	1,189
Buttevant	945	23,953	78,517	Tier 3	Smaller County Town	1,501
West SPA						
Clonakilty	4,721	15,923	47,766	Tier 1	Small to Medium County Town	7,218
Bantry	3,348	8,638	25,106	Tier 2	Small to Medium County Town	5,484
Skibbereen	2,670	9,661	30,454	Tier 2	Small to Medium County Town	3,035
Dunmanway	1,585	8,772	50,860	Tier 3	Smaller County Town	1,976
Castletownbere	912	2,468	4,310	Tier 3	Smaller County Town	1,439
Schull	658	3,433	17,136	Tier 3	Smaller County Town	748

Table 4 – Retail Settlements within 15 & 30 minute catchments (Cork County Only)		
Town	**Retail Settlements within 15mins**	**Retail Settlements within 30mins**
CASP Ring Towns		
Mallow	Buttevant	Buttevant, Charleville, Fermoy, Mitchelstown, Kanturk, Newmarket, Millstreet, Blarney, Ballyvolane, Cork City Centre.
Youghal	None	Midleton, Carrigtwohill
Bandon	None	Kinsale, Clonakilty, Macroom, Dunmanway, Ballincollig, Bishopstown, City Centre, Douglas, Mahon, Carrigaline.
Fermoy	Mitchelstown	Mitchelstown, Mallow, Glanmire, Ballyvolane, Little Island, Carrigtwohill, Midleton, Cork City Centre, Mahon, Douglas.
Kinsale	None	Carrigaline, Bandon, Ballincollig, Bishopstown, Douglas, Cork City Centre, Mahon
Macroom	None	Millstreet, Dunmanway, Bandon, Ballincollig, Bishopstown.
North SPA		
Mitchelstown	Fermoy	Fermoy, Mallow, Buttevant, Glanmire.
Charleville	Buttevant	Buttevant, Mallow, Kanturk, Newmarket.
Kanturk	Newmarket	Newmarket, Mallow, Millstreet, Buttevant, Charleville
Millstreet	None	Macroom, Kanturk, Newmarket, Mallow.
Newmarket	Kanturk	Kanturk, Millstreet, Mallow, Buttevant, Charleville.
Buttevant	Mallow, Charleville	Mallow, Charleville, Mitchelstown, Kanturk, Newmarket, Fermoy, Blarney.
West SPA		
Clonakilty	None	Bandon, Dunmanway, Skibbereen
Bantry	None	Skibbereen, Dunmanway, Schull
Skibbereen	None	Bantry, Schull, Dunmanway, Clonakilty
Dunmanway	None	Macroom, Bandon, Clonakilty, Skibbereen, Bantry
Castletownbere	None	None
Schull	None	Skibbereen, Bantry

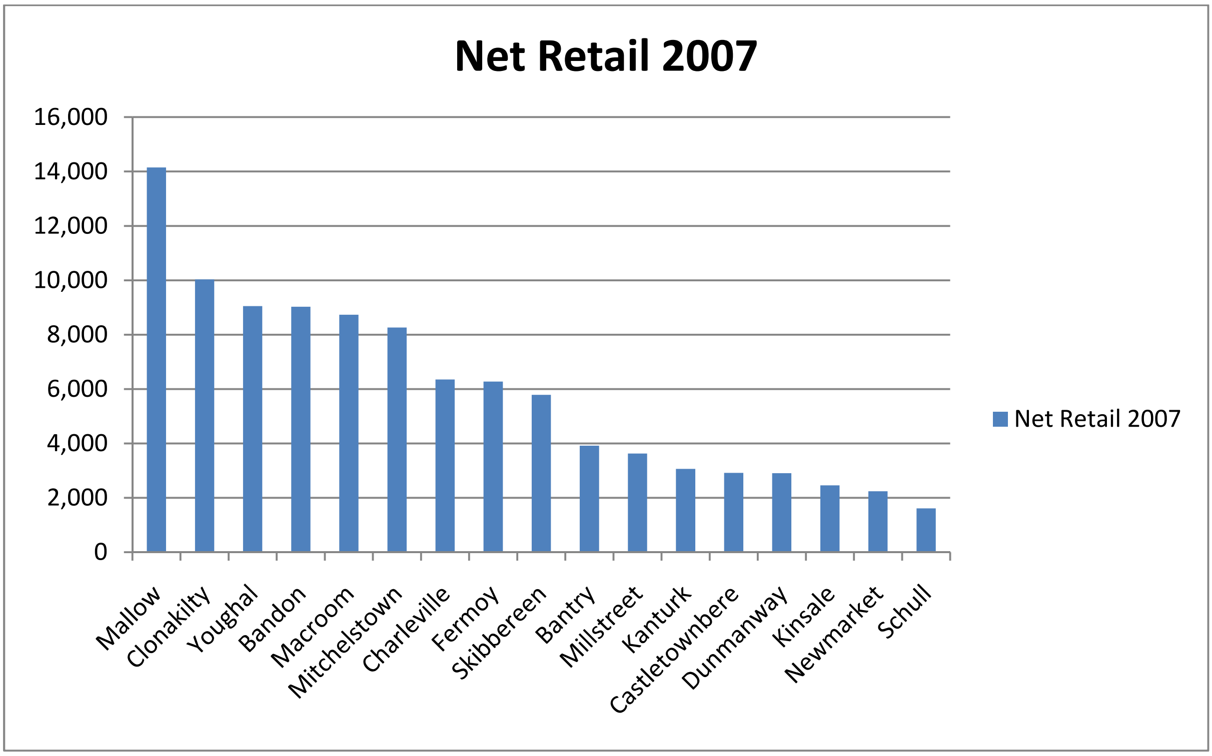
3.2 Assessing Retail Floorspace

2007 Retail Survey Figures:

The 2007 Retail Survey demonstrated that of the non-metropolitan towns Mallow had the highest level of net retail floorspace 14,150sqm (Table 5). These figures include out of centre convenience retail. This was significantly above any other towns surveyed. Clonakilty was second with over 10,000sqm of net retail floorspace. The figures demonstrate that between them (outside of the city and metropolitan area) Mallow and Clonakilty formed almost a quarter of retail floorspace in 2007.

Table 5 – Retail Floorspace figures 2007 and Town Populations 2006 and 2011

Town	2006 Population	2011 Population	2007 Net Total Floorspace (sqm)	% Total Non-Metro Floorspace 2007
Buttevant	914	945	n/a	n/a
Mallow	10,241	11,605	14,150	14%
Clonakilty	4,154	4,721	10,035	10%
Youghal	6,785	7,794	9,050	9%
Bandon	5,822	6,640	9,030	9%
Macroom	3553	3,879	8,735	9%
Mitchelstown	3,365	3,677	8,260	8%
Charleville	2,984	3,672	6,350	6%
Fermoy	5,873	6,489	6,275	6%
Skibbereen	2,338	2,670	5,790	6%
Bantry	3,309	3,348	3,915	4%
Millstreet	1,401	1,574	3,630	4%
Kanturk	1,915	2,263	3,065	3%
Castletownbere	868	912	2,915	3%
Dunmanway	1,522	1,585	2,905	3%
Kinsale	4,099	4,893	2,460	2%
Newmarket	949	988	2,240	2%
Schull	576	658	1,610	2%
			100,415	



2012 Retail Floorspace Estimates:

Table 6 which follows sets out the *Gross Floorspace Information Mapped* as derived from the town centre survey in 2012 and primarily includes a measurement of the estimated gross floorspace (ground floor footprint[1]) of different uses. Survey results are presently only available for 8 towns. The measurement may be regarded as somewhat crude but provides a strong 'indication' of the level of occupied floorspace in a town centre in relation to comparison and convenience retail and an indication of the level of gross total floorspace. The table also measures gross convenience total gross floorspace per head of population based on a 15 minute catchment and looks at the overall general vacant floorspace rate within the town centre.

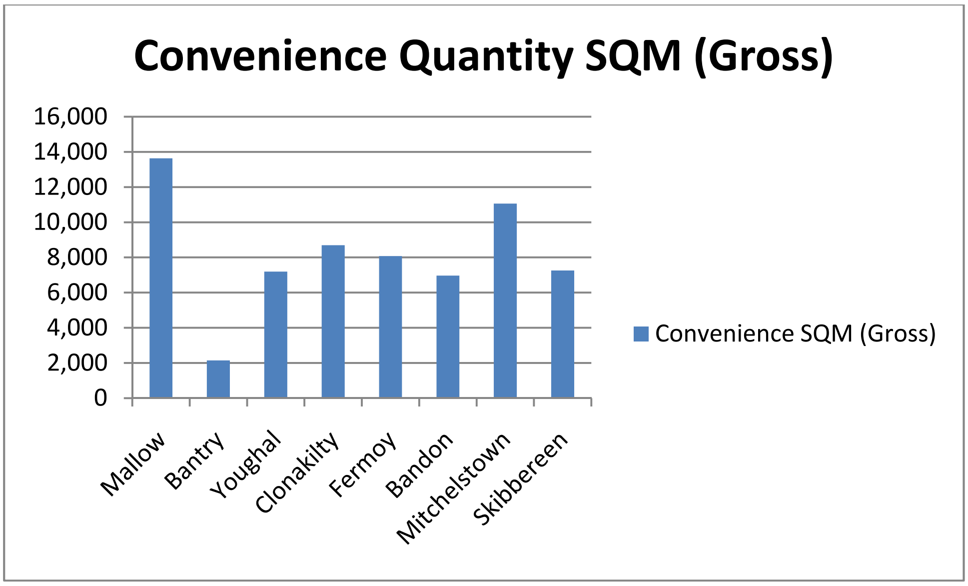
Table 6: Gross Floorspace Information Mapped 2012 (Town Centre Survey)

Town	15 min catchment pop. (hypothetical catchment)	Conv. Floorspace (Gross)	Comp. Floorspace (Gross)	Total Floorspace (Gross)	Conv. Floorspace per. Head popn in catchment	Total Gross Floorspace per. Head popn in catchment	Overall Floorspace Vacancy Rate (Non specific T. Centre Area Only)	Overall Vacancy Per Head Catchment
Mallow	28,088	13,645sqm[2]	16,000sqm[3]	29,645sqm	0.5sqm	0.98sqm	5,410sqm	0.19
Bantry	8,638	2,140sqm	5,750sqm	7,890sqm	0.2sqm	0.91sqm	1,780sqm	0.21
Youghal	13,307	7,190sqm[4]	6,150sqm	13,340sqm	0.5sqm	0.99sqm	5,590sqm	0.42
Clonakilty	15,923	8,700sqm[5]	9,200sqm	17,900sqm	0.5sqm	1.12sqm	3,330sqm	0.21
Fermoy	27,666	8,080sqm[6]	7,110sqm	15,190sqm	0.3sqm	0.5sqm	4,950sqm	0.18
Bandon	19,959	6,970sqm[7]	9,970sqm	16,940sqm	0.3sqm	0.8sqm	5,710sqm	0.29
Mitchelstown	18,662	11,060sqm[8]	5,735sqm	16,795sqm	0.6sqm	0.9sqm	4,290sqm	0.23
Skibbereen	9,661	7,260sqm[9]	6,410sqm	13,670sqm	0.7sqm	1.4sqm	6,280sqm	0.65

[1] The ground floor footprint is derived from the polygon shape of individual buildings surveyed.
[2] 9920sqm for town centre area, 1630sqm Aldi, Supervalu 2020sqm and Centra 775sqm.
[3] 12,620sqm for town centre area, 3,400sqm for CO-OP Superstore.
[4] 2140sqm for town centre area, 3,650sqm for Tesco, 1400sqm for Aldi.
[5] 5450sqm for town centre area, 3250sqm for Dunnes Stores.
[6] 2670sqm for town centre area, 2450sqm for Supervalu, 1460sqm for Lidl and estimate of 1500sqm for new Aldi.
[7] 5,200sqm for town centre area, 1770sqm for Lidl.
[8] 7,815sqm for town centre area, 1355sqm for Aldi, 1890 for Lidl.
[9] 2,890sqm for town centre area, 1920sqm for Spar, 1750sqm for Lidl, 700sqm for Costcutter.

2012 Convenience Floorspace Estimates:

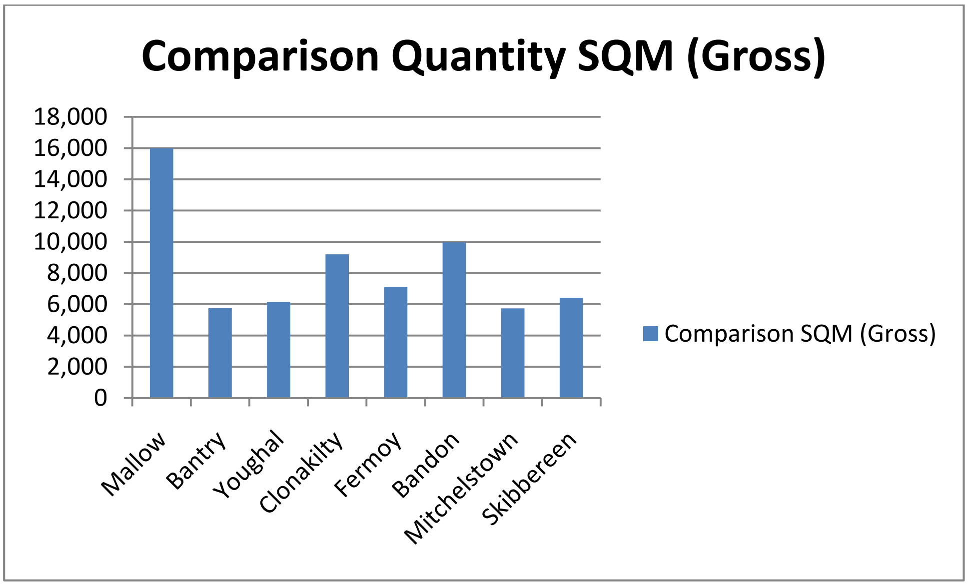
Table 6 demonstrates that of the surveyed towns Mallow (13,465sqm) has the highest overall level of gross convenience floorspace[10]. Mitchelstown (11,060sqm) is second while Clonakilty (8,700sqm) is third followed by Fermoy (8,080sqm). If the assessment is made on Floorspace per head of population in the 15 minute catchment it is noteworthy that Bantry, Fermoy and Bandon are not as well represented with regard to convenience retail as other centres. It may be that towns such as Mitchelstown or Skibbereen could have an over-representation which perhaps implies that there is presently leakage from the likes of Fermoy and Bantry to such towns which may need to be addressed.



[10] It should be noted that this is primarily a town centre figure but significant out of centre retail is also included in the figures.

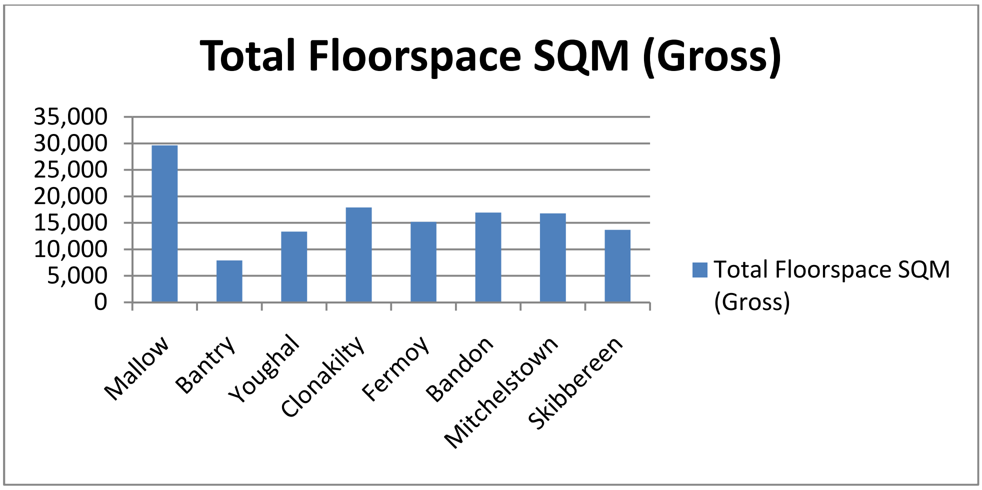
2012 Comparison Floorspace Estimates:

Mallow has a strong lead in terms of comparison floorspace. It must be noted that the comparison measurement in this instance is only within the town centre (retail core) so the figures are perhaps somewhat less reliable however many of these non-metropolitan towns do not have a significant amount of out of centre comparison retailing. The results demonstrate the dominance of Mallow. It also notes that Bandon and Clonakilty are particularly strong. It appears that some of the Ring Towns may need to improve their quantity of comparison floorspace if they are to be in line with other Ring Towns, particularly Fermoy and Youghal.



2012 Gross Total Retail Floorspace Estimates:

Mallow is well to the fore with the highest quantity of overall gross retail floorspace. Clonakilty is second followed by Bandon and Mitchelstown which are also well represented. When this is assessed per head of population in the 15 minute catchment it is noteworthy that Fermoy in particular is somewhat under-represented for the size of its catchment while towns such as Clonakilty and Skibbereen seem to be over-represented. In Skibbereen this may be due to its more peripheral location away from other major centres or in the case of Clonakilty its higher order role within West Cork.



Comparison of 2007 retail and 2012 retail estimates:

In the 2007 Retail Study Mallow had the highest quantity of convenience and comparison floorspace within its town centre for a non-metropolitan town. Clonakilty was second with over 10,000sqm of net retail floorspace. Outside of Cork City and Suburbs the towns of Midleton, Mallow, Ballincollig and Clonakilty were the four best represented settlements in terms of town centre retail floorspace.

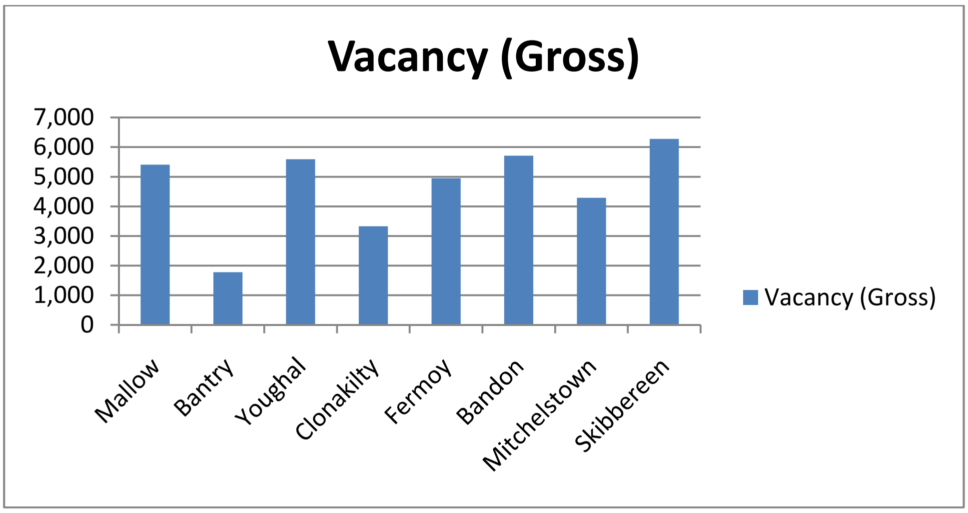
In 2012 the towns of Mallow and Clonakilty continue to lead the way in terms of non-metropolitan retail floorspace. Mitchelstown has a substantial level of convenience floorspace provision when compared to other similarly sized centres. While there appears to have been an increase in the quantity of convenience retail floorspace in all centres the towns of Fermoy, Mitchelstown and Skibbereen in particular appear to have borne witness to the most dramatic increases. Notably, of the 12 towns surveyed in 2012 including out of centre convenience retail, Bantry and Youghal appear to have made the least expansion in this area.

The majority of centres surveyed in 2012 saw some expansion in occupied comparison retail floorspace in the town centre area. Mallow and Clonakilty saw the most significant increases while towns such as Mitchelstown and Youghal appeared to remain almost stagnant in terms of overall occupied floorspace. (It should be noted that the figures in relation to comparison only relate to the town centre area and areas outside of this have not been quantified)

Overall Floorspace Vacancy (Non Specific) (Town Centre Only):

Information in relation to vacancy was sourced from the town centre surveys carried out earlier in 2012 (Table 6). In terms of floorspace vacancy within the town centre area surveyed (not strictly limited to retail uses) Skibbereen has the highest overall gross vacant floorspace. Bandon and Youghal also have a relatively high quantity of vacant floorspace. Bantry appears to be the best performing town centre of those surveyed in terms of vacancy with less than 2000sqm of gross vacant floorspace while Clonakilty also fares reasonably well in this regard.

When these figures are analysed per 15 minute catchment population Skibbereen displays the highest level of town centre vacancy. Youghal also displays a high level of vacant floorspace per catchment population. Fermoy, Mallow and Bantry have the lowest proportion of vacant floorspace per head of catchment population.



2012 Floorspace provision per head population in 15 minute catchment:

In 8 of the towns gross floorspace provision per head of population in the catchment was measured for comparative purposes. The results are highlighted in the following table. The results appear to demonstrate that the town of Fermoy is perhaps somewhat under-represented in terms of retail floorspace based on its catchment. Skibbereen also appears to have a high floorspace rate per head of catchment population.

Table 7 – Gross Floorspace provision per head population in 15 minute catchment

Towns	**Gross Floorspace per head population in 15 minute catchment**
Mallow	0.98sqm
Clonakilty	1.12sqm
Youghal	0.99sqm
Bandon	0.8sqm
Mitchelstown	0.9sqm
Fermoy	0.5sqm
Skibbereen	1.4sqm
Bantry	0.91sqm

3.3 Presence of Convenience Retailers and Planning Commitments

Appendix A includes a number of tables. The first outlines the presence of the different convenience operators in the Cork non-metropolitan towns (Table 8). Of the Non-Metropolitan towns Mallow is the only town which currently has a representation of all 3 of the largest national retail operators i.e. Tesco, Dunnes Stores and Supervalu. This is perhaps reflective of its hub town status within the National Spatial Strategy.

Nationally Tesco has the largest share of the Irish retail market followed by Dunnes and Supervalu in the non-metropolitan Cork towns. Dunnes and Tesco are only represented in 4 and 3 of 18 towns respectively. Supervalu has the highest representation being present in 16 of the 18 towns. Supervalu and Centra appear to have a disproportionate representative share in Cork perhaps reflecting the local influence of the Musgrave Group. The representative share of both Lidl and Aldi supermarkets (previously known as discount stores) has expanded significantly in the non-metropolitan towns in recent years. Lidl now have 9 stores and Aldi 4 stores. 3 Aldi stores are currently pending planning permission.

Tables 10 and Table 11 outline the outstanding planning permission and noted planning interest. At present it is estimated that there is over 8000sqm convenience, 1400sqm comparison and 2400sqm retail warehousing in extant planning permissions in the non-metropolitan towns. A number of other significant decisions are currently pending or awaiting appeal decisions primarily for supermarket-type developments.

Appendix A:

Table 8 – Retailer Presence in Non-Metropolitan Towns

Town	2011 Population	Draft Target 2022	Retailer Presence	Total	Recent/Future Interest
CASP Ring Towns					
Mallow	11,605	20,000	Dunnes, Tesco, Centra, Lidl, Supervalu, Centra, Aldi	7	Significant recent interest in additional retail.
Youghal	7,794	8,309	Supervalu, Tesco, Lidl, Centra	4	Discount store with permission
Bandon	6,640	7,379	Supervalu, Lidl	2	Aldi (pending). Some retail warehousing
Fermoy	6,489	7,442	Centra, Supervalu, Lidl, Aldi	4	
Kinsale	4,893	7,247	Supervalu, Lidl, Eurospar	3*	
Macroom	3,879	4,351	Supervalu, Dunnes, Lidl	3*	Aldi (pending)
North SPA					
Mitchelstown	3,677	5,346	Tesco, Supervalu, Centra, Aldi, Lidl	5	
Charleville	3,672	4,925	Supervalu, Dunnes, Lidl, Centra	4*	Aldi (pending)
Kanturk	2,263	2,400	Supervalu, Lidl, Centra	3*	
Millstreet	1,574	1,756	Supervalu, Centra	2*	
Newmarket	988	1,189	Supervalu, Centra	2*	
Buttevant	945	1,501	Centra	1*	
West SPA					
Clonakilty	4,721	7,218	Supervalu, Centra, Londis, Eurospar, Dunnes	5	Outstanding discount. Recent other interest
Bantry	3,348	5,484	Supervalu, Mace, Centra	3	Discount permission and Unnamed pending
Skibbereen	2,670	3,035	Supervalu, Londis, Lidl, Spar	4	2011 PA for large retail unit & RWH (FI)
Dunmanway	1,585	1,976	Supervalu, Independent, Centra, Aldi	4*	
Castletownbere	912	1,439	Supervalu, Centra	2*	Possible interest from discount retailer
Schull	658	748	Eurospar, Centra	2*	

*indicates that quantity of retailers per settlement has only been verified by desktop survey.

Table 9 – Quantitative representation of Convenience Retailers in the 18 Non-Metropolitan Towns	
Store Name	**Number**
Supervalu	16
Dunnes	4
Tesco	3
Aldi	4
Lidl	9
Centra	14

Table 10 – Approximate extant retail planning permissions per town[11]			
Town Name	**Convenience**	**Comparison**	**Retail Warehousing**
Mallow	1925	505	
Youghal	1445		
Bandon		935	
Kanturk			1675
Fermoy	460		755
Macroom	1400		
Clonakilty	1400		
Bantry	1400		
Totals	**8030**	**1440**	**2430**

[11] Figures are an approximation. In a number of instances detailed information in relation to the planning application was unavailable and estimates were included from time to time. A number of significant files remain on appeal (Bantry and Charleville) while others are at the FI stage (Skibbereen and Bandon) in September 2012.

Table 11 – Known outstanding or undeveloped planning commitments

Town	Relevant Planning References	Notes on Retail Activity
CASP RING TOWNS		
Mallow	10/55012, 08/55077, 08/7665, 12/5378, 05/55048.	10/55012 – 1747sqm retail outlet, 505sqm retail units; 08/550077 – Change of use of store to non-convenience retail (Co-op); 08/7665 – Demolish Centra (1020sqm) and replace with 2180sqm gross; 12/5378 – Additional 175sqm convenience retail. Revised alternative to 08/7665 proposal it seems; 05/55048 – 24,000sqm retail (10k RWH and 14k in other retail units). EoT may have been refused. It is understood that there has been provisional interest in an additional Lidl/Aldi store in Mallow.
Youghal	07/58069, 11/58005	07/58069 – Tesco extension 1280sqm; 11/58005 – Possible discount store approved. 1445sqm (GFA) as part of mixed use including 3 units (934sqm).
Bandon	12/4684, 08/4064, 09/4391	12/4684 – 1455sqm Aldi store (currently at FI); 08/4064 – 500sqm retail warehousing; 09/4391 – 1177sqm retail warehousing.
Fermoy	10/8459, 08/51038	2 considerable retail schemes refused (08/6992) and (08/51009) within and directly east of town centre; 10/8459 – 462sqm extension to Supervalu; 08/51038 – Aldi recently constructed and operational. Town Council Area.
Kinsale	n/a	No recent applications
Macroom	12/54007	12/54007 – Aldi permitted. Estimated size 1400sqm
North SPA		
Mitchelstown	n/a	No recent applications
Charleville	11/6161	11/6161 - Aldi permitted. APB appeal at present
Kanturk	08/9539	08/9539 – (ABP reference 233945 approved 755sqm retail warehouse and 1430sqm car showrooms)
Millstreet	None	No recent applications
Newmarket	None	No recent applications
Buttevant	n/a	No recent applications
West SPA		
Clonakilty	12/50005, 08/50027, 11/50004	12/50005 – (EoD) Town Council permission includes reference to discount store. Estimated size 1400sqm. 07/50005 permission for original discount store. 08/50027 – Additional retail elements at Scally's; 11/50004 – Lidl refused. May 2011.
Bantry	09/946, 10/239	09/946 – 1125sqm net discount retail permitted and undeveloped. 10/239 – 2776sqm net supermarket permitted. Currently under appeal
Skibbereen	11/57066	11/57066 – 4,800sqm gross retail store and 1500sqm retail warehouse – FI stage
Dunmanway	n/a	No recent applications
Castletownbere	n/a	No recent applications. It is understood that Aldi may be interested in pursuing a proposal.
Schull	n/a	No recent applications

Table 12 - Composite Table – Summary of Key Information

Town	Town Popn. 2012	15 min catchment pop. (hypothetical catchment)	Gross Convenience floorspace estimate 2012 (2007 net in brackets)	Gross Comparison floorspace estimate 2012 (2007 net in brackets)	Gross Total Floorspace estimate 2012 (2007 net in brackets)	Gross Floorspace 2012 per. Head popn in 15 min. (2007 net in brackets vs. 2012 figure)	Overall Floorspace Vacancy Level 2012 (Non specific T. Centre Area Only)
Buttevant	945	23,953	No information	No information	No information	No information	No information
Mallow	11,605	28,088	13,645sqm (5,790)	16,000sqm (8,360)	29,645sqm (14,150)	0.98sqm (0.5sqm)	5,410sqm
Clonakilty	4,721	15,923	8,700sqm (4,835)	9,200sqm (5,200)	17,900sqm (10,035)	1.12sqm (0.6sqm)	3,330sqm
Youghal	7,794	13,307	7,190sqm (3,865)	6,150sqm (5,185)	13,340sqm (9,050)	0.99sqm (0.7sqm)	5,590sqm
Bandon	6,640	19,959	6,970sqm (2,315)	9,970sqm (6,715)	16,940sqm (9,030)	0.8sqm (0.4sqm)	5,710sqm
Macroom	3,879	12,331	(4,795)	(3,940)	(8,735)	(0.7sqm)	
Mitchelstown	3,677	18,662	11,060sqm (3,845)	5,735sqm (4,415)	16,795sqm (8,260)	0.9sqm (0.4sqm)	4,290sqm
Charleville	3,672	16,717	(2,950)	(3,400)	(6,350)	(0.4sqm)	
Fermoy	6,489	27,666	8,080sqm (1,420)	7,110sqm (4,855)	15,190sqm (6,275)	0.5sqm (0.2sqm)	4,950sqm
Skibbereen	2,670	9,661	7,260sqm (2,160)	6,410sqm (3,630)	13,670sqm (5,790)	1.4sqm (0.6sqm)	6,280sqm
Bantry	3,348	8,638	2,140sqm (1,105)	5,750sqm (2,810)	7,890sqm (3,915)	0.91sqm (0.5sqm)	1,780sqm
Millstreet	1,574	7,302	(900)	(2,730)	(3,630)	(0.5sqm)	
Kanturk	2,263	12,164	(1,170)	(1,895)	(3,065)	(0.3sqm)	
Castletownbere	912	2,468	(1,120)	(1,795)	(2,915)	(1.2sqm)	
Dunmanway	1,585	8,772	(1,165)	(1,740)	(2,905)	(0.4sqm)	
Kinsale	4,893	13,914	(520)	(1,940)	(2,460)	(0.2sqm)	
Newmarket	988	8,658	(995)	(1,245)	(2,240)	(0.3sqm)	
Schull	658	3,433	(860)	(750)	(1,610)	(0.5sqm)	
			39,810	60,605	100,415		

Appendix B –Sample Individual Town Actions e.g. Mallow

This appendix sets out an example of the type of information gathered for an individual town. The information is sourced from both the Draft Town Centre Study Prepared in May 2012 and facts collected in this background document. It is also envisaged that the information gathered could inform individual statements in relation to towns regarding the level and form of appropriate retailing as is a requirement of the Retail Planning Guidelines. The following is an example for Mallow

Possible Table: Mallow	
Population 2011	11,605
15 Minute Catchment Population	28,088
Retail Settlements @ 15 minutes	Buttevant
Retail Settlements @ 30 minutes	Buttevant, Charleville, Fermoy, Mitchelstown, Kanturk, Newmarket, Millstreet, Blarney, Ballyvolane, Cork City Centre.
2007 net floorspace	14,150sqm
2012 gross floorspace estimate	29,645sqm
Noted Retail Development Since 2007	
Noted operators in the town	Dunnes, Tesco, Centra, Lidl, Supervalu, Centra, Aldi
Outstanding Committments	Convenience estimated 1900sqm, Comparison 500sqm.
Noted Retail Interest	Significant interest in additional retail

Mallow continues to be the most significant retail centre outside of the City and suburbs within the County. It is the largest of the Ring towns and a hub town in the National Spatial Strategy. In 2007 it supported 8,360sqm of comparison goods floorspace and 5,790sqm of convenience floorspace. The 2012 town survey estimates that there is now approximately 13,645sqm gross of convenience and 16,000sqm gross of comparison goods. The town has a wide range of both convenience and comparison outlets and has a large catchment.

Town Centre Issues which need to be addressed:

- Challenge is to develop Mallow into the National Spatial Strategy Hub town from its base as a traditional market town.
- Vacancy needs to be monitored to ensure no disimprovement of the present situation.
- Uses with a retailing element in out-of-centre locations need to be carefully considered.
- Derelict, brownfield and opportunity sites need to be prioritised. Key derelict sites on Main Street need to be targeted for renewal.
- Public Realm improvements needed to make the town centre more attractive particularly regarding the dominance of traffic and parking in the town.
- Improve pedestrian permeability and overall mobility management within the town.

Additional Examples e.g. Fermoy and Mitchelstown

Fermoy:

Fermoy is a designated Ring Town with a sub-regional role. It is located within the 15 minute drive time catchment of Mitchelstown.

In terms of retail floorspace in the 2007 Retail Study Fermoy was somewhat underrepresented as Ring town with less net floorspace than the other Ring Towns of Mitchelstown, Macroom, Bandon, Youghal, etc. While the situation has improved it is evident from the findings of the 2012 survey that it remains somewhat underrepresented when compared with the other Ring Towns especially nearby Mitchelstown to which there may be some leakage. A key site remains unprogressed within the town centre which explains some of the shortage of floorspace.

Whilst Fermoy has the lowest vacancy per head of population of the 2012 towns surveyed it still has a significant level of gross vacant floorspace i.e. almost 5000sqm. The supply of comparison and convenience floorspace could be improved to align with other towns.

Mitchelstown:

Mitchelstown is a Main Town within the North Strategic Planning Area. Due to its size it has important sub-regional retailing functions. It is located within the 15 minute drive time catchment of the town of Fermoy and yet has a higher quantity of convenience retail floorspace.

Mitchelstown has a significant quantity of vacant floorspace (over 4000 sqm) although when examined at catchment level it is in line with nearby towns surveyed. Mitchelstown appears to have witnessed significant expansion of the convenience retail floorspace in recent years while there has been little significant expansion of comparison. Given the level of provision of convenience floorspace and relative shortfall in nearby towns must be assessed whether Mitchelstown may have exceeded its convenience requirements in the medium term.